cvent

# Cvent Student Certification Study Guide

## 2014

Cvent, Inc
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# Contents

Planner Training I: Creation, Search, and Send ..... 4

Planner Training II: Responses, Reporting and Awarding ..... 22

Planner Training III: Tips & Tricks ..... 37



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# Planner Training I: Creating, Searching, & Sending RFPs

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# Familiarize Yourself

Before watching this video, it is recommended that you have reviewed the introductory video and understand the core objectives.

## Introduction to CSN Training for Planners

- Recognize the organization and layout of Cvent
- Identify where to access support resources in your account

Watch the Video


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# Introduction

## Common Obstacles

This training has been developed based on common obstacles experienced by our customers. Before continuing the video, think about the following questions and how they apply to planners' daily tasks.

## Have you ever experienced difficulty or obstacles with…

- Organizing complex lead information rather than using an Excel or Word format?
- Duplicating efforts when creating repeat business?
- Qualifying venues that meet your RFP requirements?
- Distributing your RFP through phone, fax, email, and online channels?

## What will be covered in this training?

This is the first of three videos in the CSN Training for Planners series. In this video, you will learn the basics in building your first RFP. After completing this training you will be able to:

- Identify how Cvent is organized and navigate to the appropriate section.
- Create a request for proposal (RFP) in your Cvent account.

**APPLY IT:** Create leads in an organized format.

- Search for qualified venues.

**APPLY IT:** Locate suppliers that can accommodate the details included in your RFP.

- Send your RFP to the selected venues.

**APPLY IT:** Send your RFP in one format and successfully track suppliers in a centralized location.


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# Navigating in Cvent

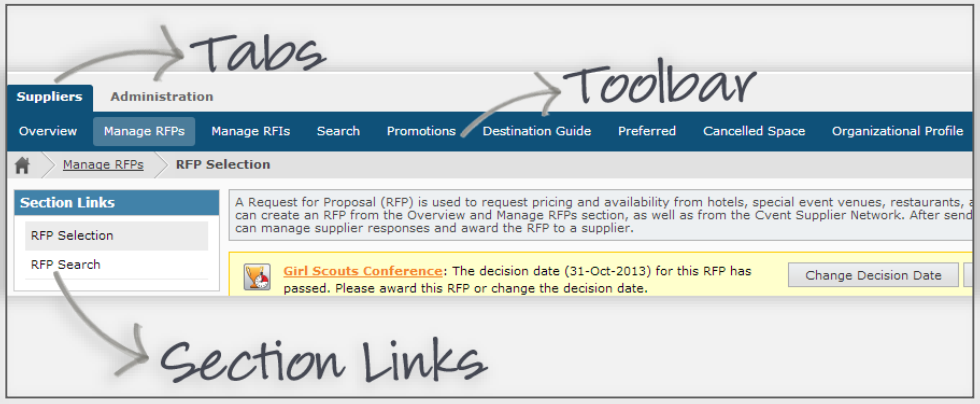
Before learning how to create an RFP, it's important to understand the basics of your account.

## Tabs, the Toolbar, and Section Links

**Tabs** are the highest level of organization in Cvent. The **Suppliers** tab stores all information related to each request for proposal (RFP). The **Administration** tab stores all of your account wide settings.

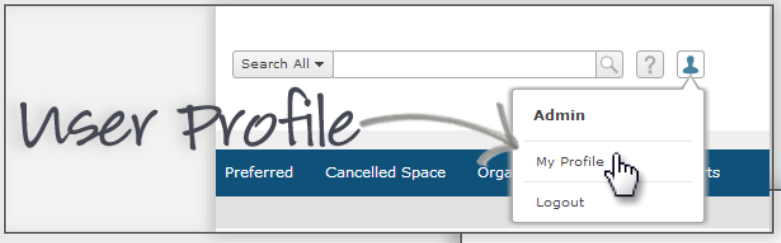
Within each tab, you'll see a **toolbar** containing multiple sections. Each section relates to a different task related to the RFP lifecycle.

Finally, within each section of the toolbar, you'll see **section links** on the left. Section links are individual links that focus on narrow topics.


Tabs
Toolbar
Suppliers
Administration
Overview
Manage RFPs
Manage RFIs
Search
Promotions
Destination Guide
Preferred
Cancelled Space
Organizational Profile
Manage RFPs
RFP Selection
Section Links
RFP Selection
RFP Search
A Request for Proposal (RFP) is used to request pricing and availability from hotels, special event venues, restaurants,
can create an RFP from the Overview and Manage RFPs section, as well as from the Cvent Supplier Network. After send
can manage supplier responses and award the RFP to a supplier.
Girl Scouts Conference: The decision date (31-Oct-2013) for this RFP has passed. Please award this RFP or change the decision date.
Change Decision Date
Section Links

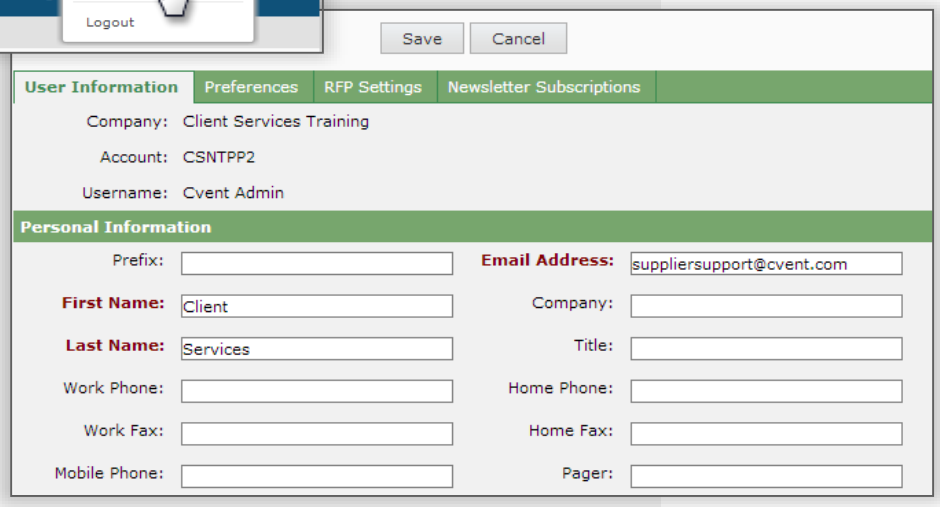
## Account Search and User Profile

Use the Account Search at the top of your account to search for RFPs in your account.




Click **My Profile** to customize your user settings. View your account number, username, and personal contact information.

Maximize your account by adjusting your account preferences such as the first tab to display. In the RFP Settings, customize your email preferences, searching options, and proposal requirements.



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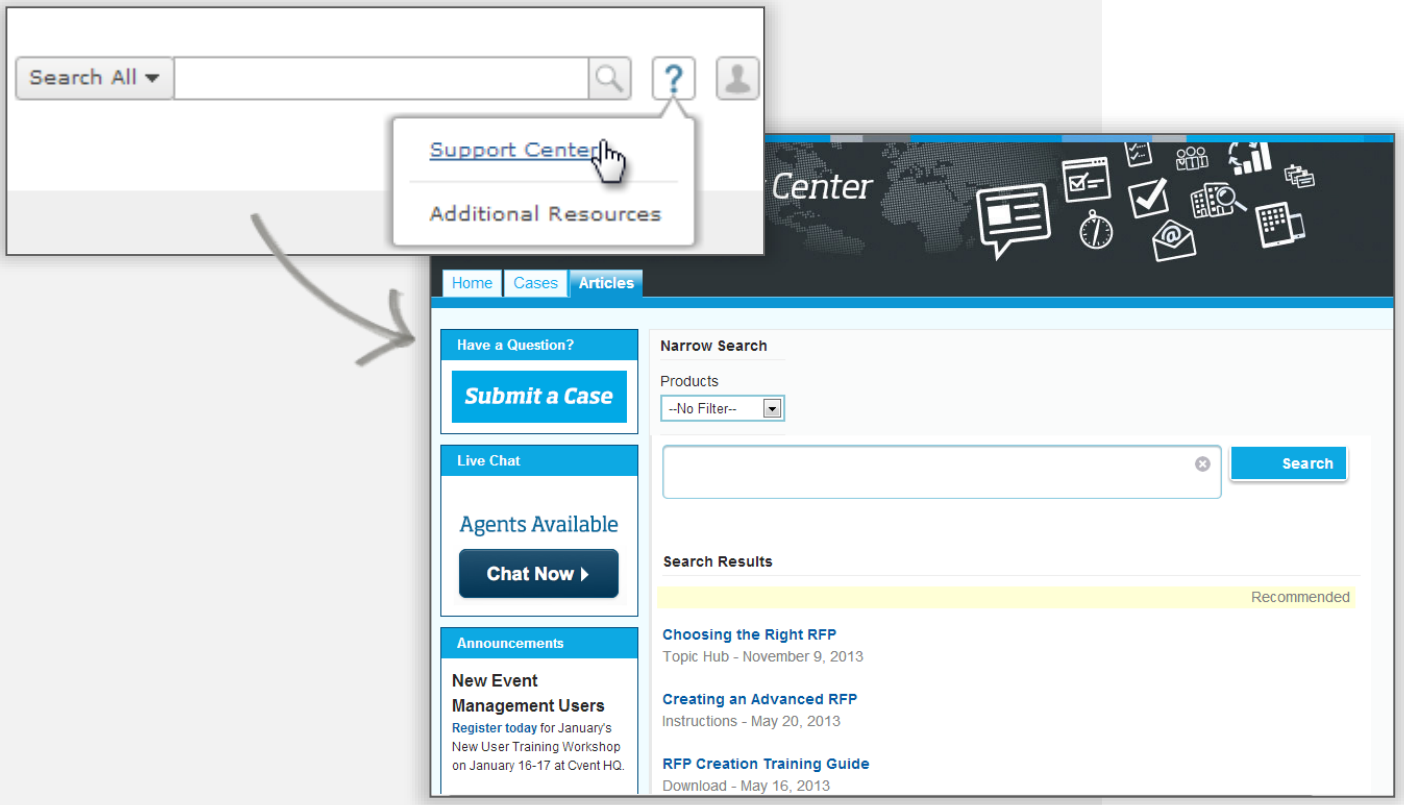
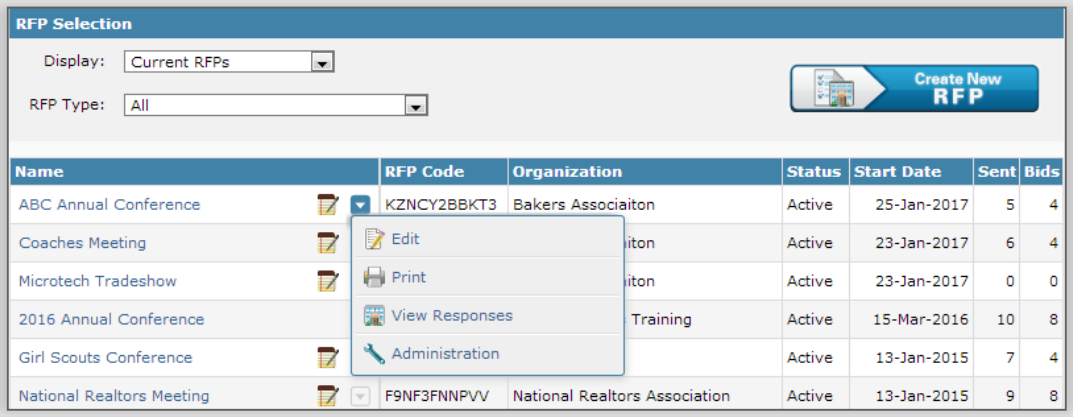
## Support Center

When you have additional questions, Cvent's Support Center is your one-stop-shop for all of your resources. Click the **"?"** in the upper right side of your account and select **Support Cente**r. Search for helpful videos and articles, and even submit your questions to our experts.




## Manage RFPs Dashboard

Use the Manage RFPs Dashboard to easily navigate between different RFPs in your account. Simply use the dropdown menu next to each RFP name to edit the RFP, print the RFP, view supplier responses, or access administration sections. To access this section, click **Manage RFPs** in the toolbar.





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# Creating a Request for Proposal or RFP

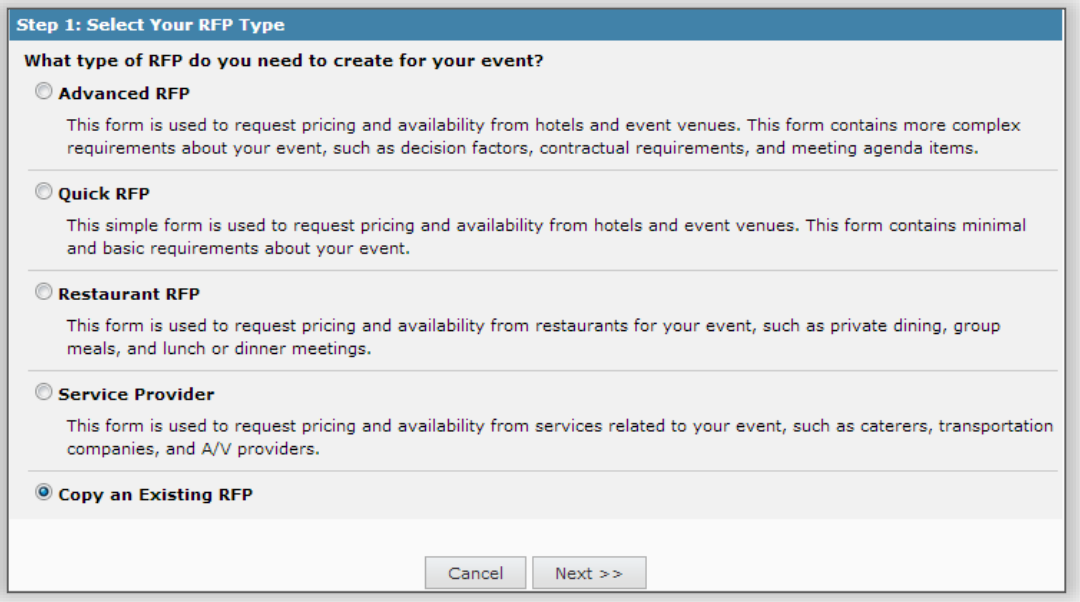
Now that you have a basic understanding of how to navigate in your account, let's move onto the first objective, creating a request for proposal. Begin by clicking **Manage RFPs** in the top toolbar and, select **Create New RFP.** This opens brings up a seven step wizard to create your RFP.

In this training, we will focus on the required fields throughout the wizard. These are all marked in red, bold text.

**TIP:** Although this training will not discuss the optional fields in the wizard, it is recommended to complete as many fields as you can to increase the quality of response.

## Step 1: Select Your RFP Type

Choose the best RFP type for your event. The two most common RFP types are the Advanced RFP and the Quick RFP. **A Quick RFP** is a simple form and requires the basic information about your event. An **Advanced RFP** allows you to add an extensive amount of details including contractual requirements, decision factors, specific meeting room sizes and setup, and much more. In this example, we're going to **Copy an existing Advanced RFP** to demonstrate the time-saving features of copying an RFP and click **Next >>**. If you're copying an RFP, you'll search for the RFP to copy, otherwise, you'll move onto Step 2.


Step 1: Select Your RFP Type
What type of RFP do you need to create for your event?
Advanced RFP
This form is used to request pricing and availability from hotels and event venues. This form contains more complex requirements about your event, such as decision factors, contractual requirements, and meeting agenda items.
Quick RFP
This simple form is used to request pricing and availability from hotels and event venues. This form contains minimal and basic requirements about your event.
Restaurant RFP
This form is used to request pricing and availability from restaurants for your event, such as private dining, group meals, and lunch or dinner meetings.
Service Provider
This form is used to request pricing and availability from services related to your event, such as caterers, transportation companies, and A/V providers.
Copy an Existing RFP
Cancel
Next >>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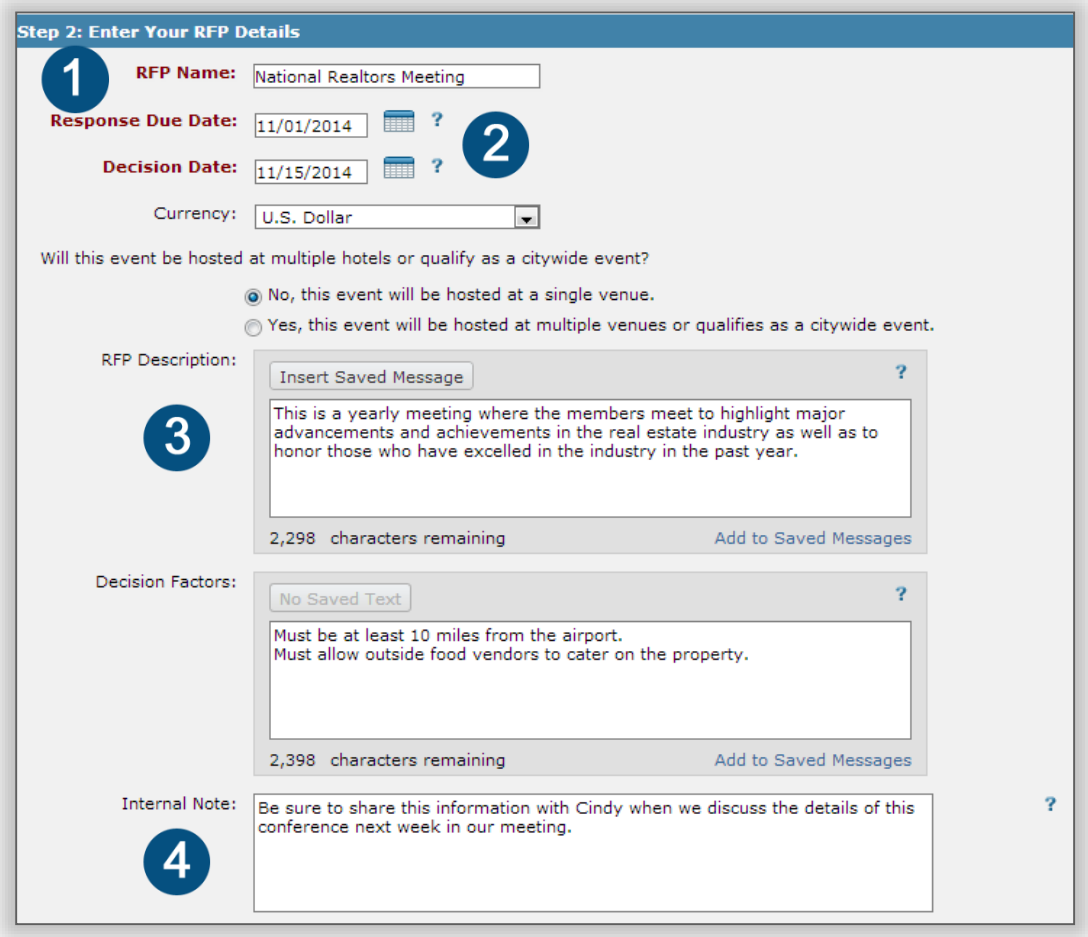
## Step 2: Enter your RFP Details

In Step 2, continue filling out information regarding your RFP.


Step 2: Enter Your RFP Details
1
RFP Name:
National Realtors Meeting
Response Due Date:
11/01/2014
Decision Date:
11/15/2014
2
Currency:
U.S. Dollar
Will this event be hosted at multiple hotels or qualify as a citywide event?
No, this event will be hosted at a single venue.
Yes, this event will be hosted at multiple venues or qualifies as a citywide event.
RFP Description:
Insert Saved Message
3
This is a yearly meeting where the members meet to highlight major advancements and achievements in the real estate industry as well as to honor those who have excelled in the industry in the past year.
2,298 characters remaining
Add to Saved Messages
Decision Factors:
No Saved Text
Must be at least 10 miles from the airport.
Must allow outside food vendors to cater on the property.
2,398 characters remaining
Add to Saved Messages
Internal Note:
4
Be sure to share this information with Cindy when we discuss the details of this conference next week in our meeting.

1 **RFP Name** – Enter a name for this RFP. This is how you'll refer to the RFP in your account.

2 **Response Due Date** – This is the date supplier responses are due for this RFP.

**Decision Date** – This is the date the planner expects to award the business to a specific supplier.

3 **RFP Description** – Include general information about the RFP here. Sleeping room and meeting room can be entered separately in the RFP's event requirements.

4 **Internal Note** – Include any helpful information to identify the RFP. This information will only be seen by you and your staff in your account.

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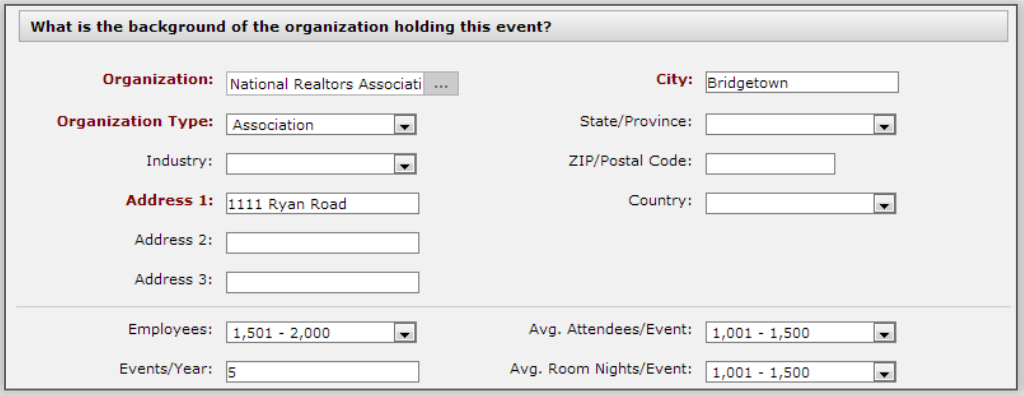
The last field to complete in this step is the Key Contact Information. Include the information for the best person to contact for the RFP, such as the lead catcher. Click **Next >>** to move into Step 3.

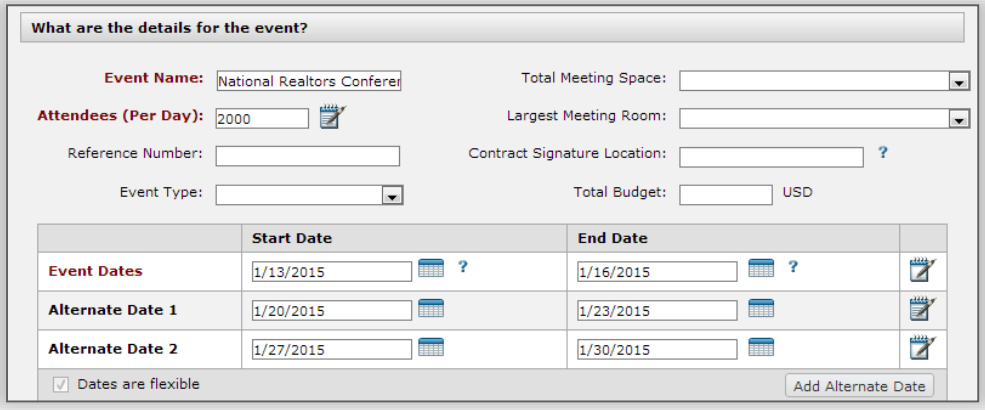
## Step 3: Enter Your Event Details

In Step 3, fill out information regarding your organization and event. You'll first provide additional information about your organization.




**TIP:** To increase the quality of responses, complete as many fields that you can.

Continue filling out the event information including the Event Name and expected attendees per day along with the event Start and End date.





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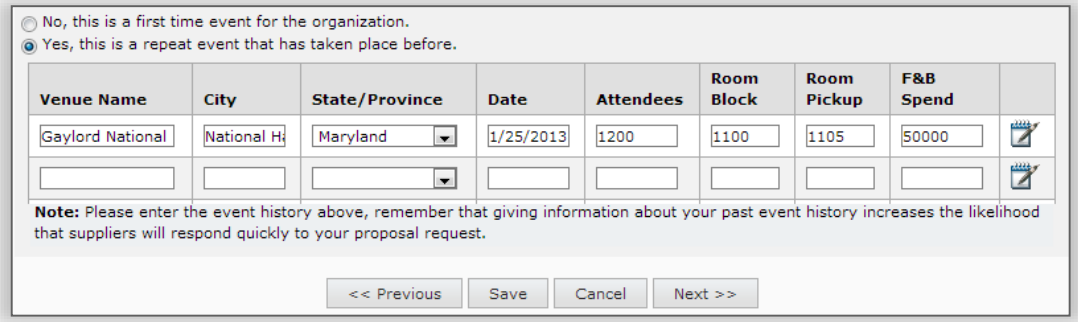
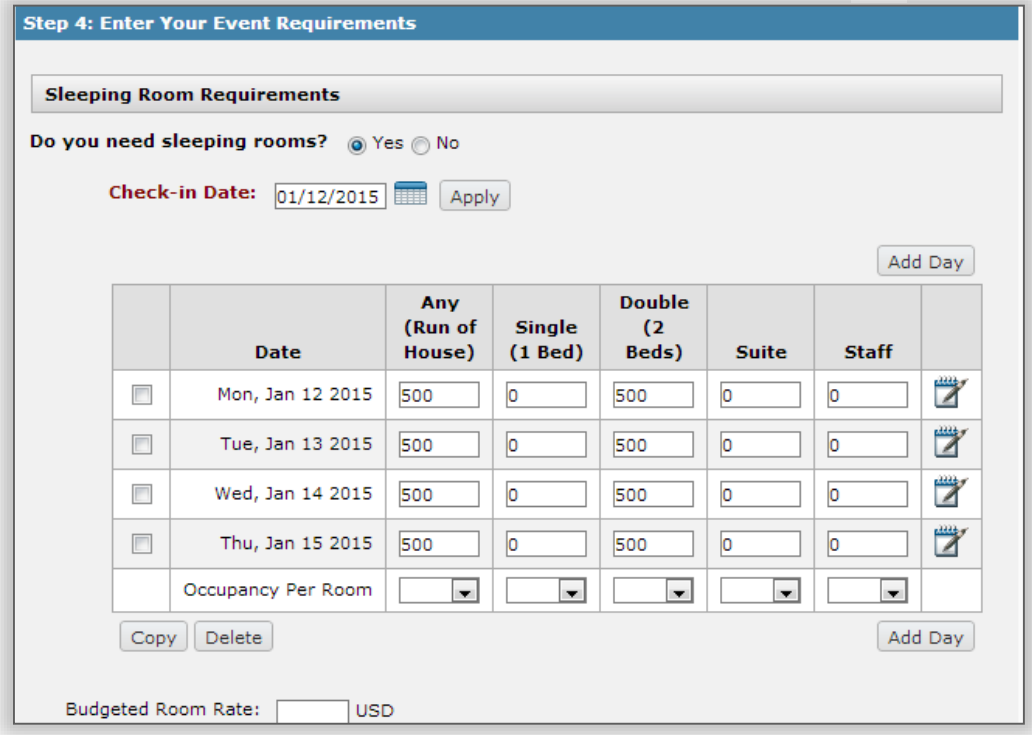
Lastly, choose if this is a repeat event that has taken place before. If it is, complete the event information to increase the likelihood that suppliers will respond quickly to your proposal request. Click **Next >>** to move into Step 4.




## Step 4: Enter Your Event Requirements

In this step, enter the quantities for any sleeping rooms throughout the duration of the event. To add additional notes to any room type, use the notepad icon to the right.


Step 4: Enter Your Event Requirements
Sleeping Room Requirements
Do you need sleeping rooms? Yes No
Check-in Date: 01/12/2015 Apply
Add Day
Date
Any (Run of House)
Single (1 Bed)
Double (2 Beds)
Suite
Staff
Mon, Jan 12 2015 500 0 500 0 0
Tue, Jan 13 2015 500 0 500 0 0
Wed, Jan 14 2015 500 0 500 0 0
Thu, Jan 15 2015 500 0 500 0 0
Occupancy Per Room
Copy
Delete
Add Day
Budgeted Room Rate: USD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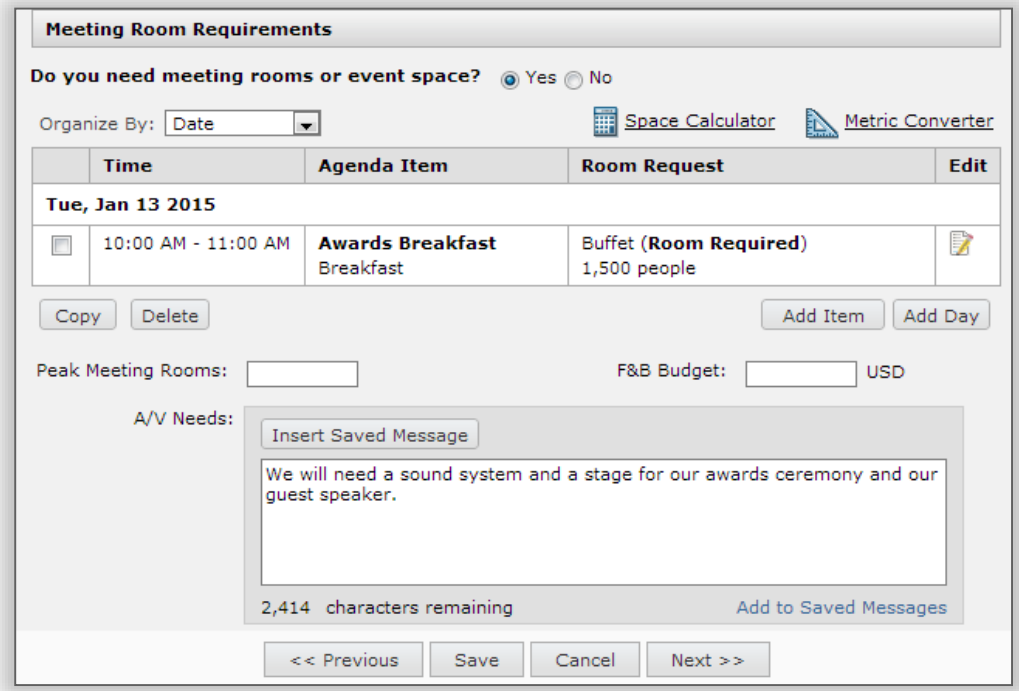
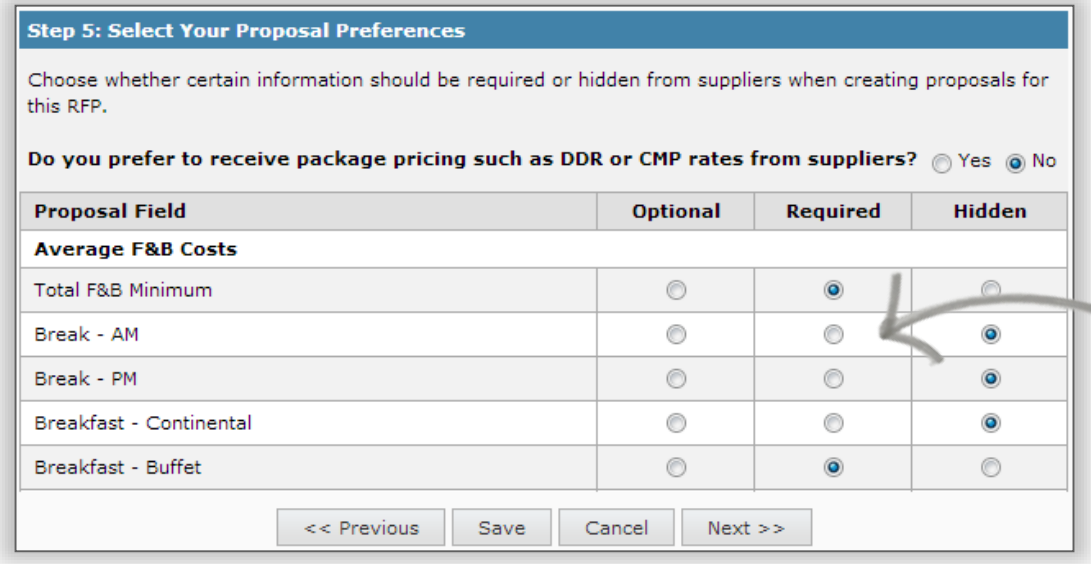
Continue filling out the Meeting Room Requirements. To modify any of the item details, click the edit icon and adjust the information. To add new items to your agenda, click **Add Item** and enter the item's details in the pop-up window. Additionally, if the new item information is the same as the existing item, simply select the item and click **Copy.** Choose the selected dates and click **Apply.** Once you've added all of your details, click **Next >>** to move into Step 5.




## Step 5: Select Your Proposal Preferences

In this step, set up your default proposal preferences. Scroll through the various proposal fields and choose to make them optional, required, or hidden. Click **Next** >> to move into Step 6.


Step 5: Select Your Proposal Preferences
Choose whether certain information should be required or hidden from suppliers when creating proposals for this RFP.
Do you prefer to receive package pricing such as DDR or CMP rates from suppliers? Yes No
Proposal Field
Optional
Required
Hidden
Average F&B Costs
Total F&B Minimum
Break - AM
Break - PM
Breakfast - Continental
Breakfast - Buffet
<< Previous
Save
Cancel
Next >>

***Total F & B Minimum*** *will be* ***mandatory*** *for suppliers to answer when creating proposals for this RFP.*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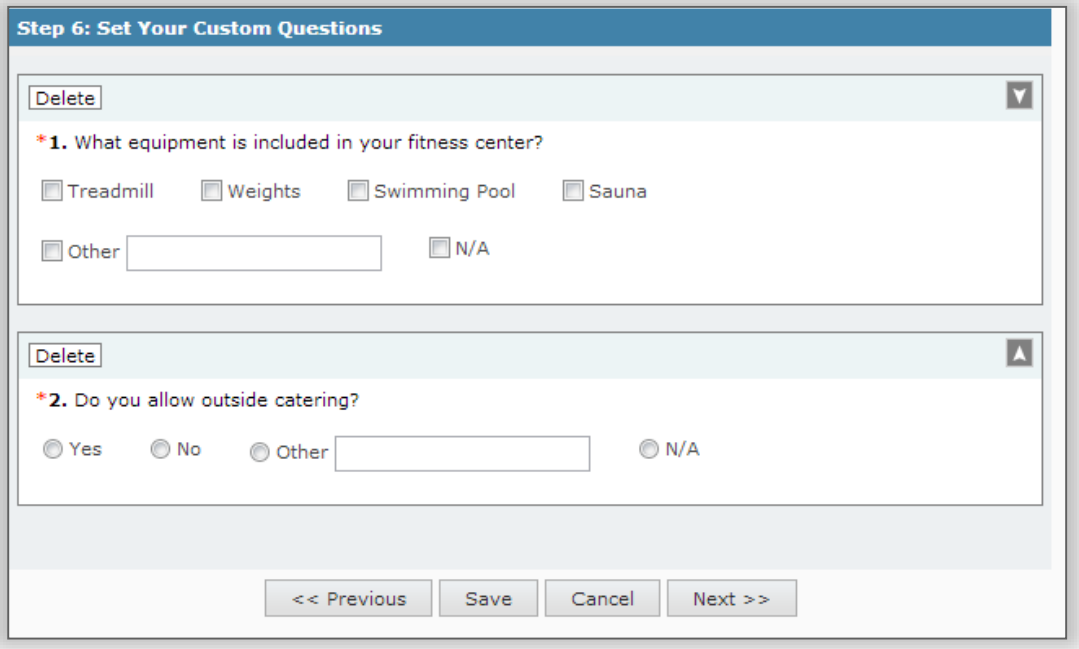
## Step 6: Custom Questions

In this step, ask additional questions to suppliers to help you make your decision on the right venue. Click **Next >>** to move into the last step of the wizard.





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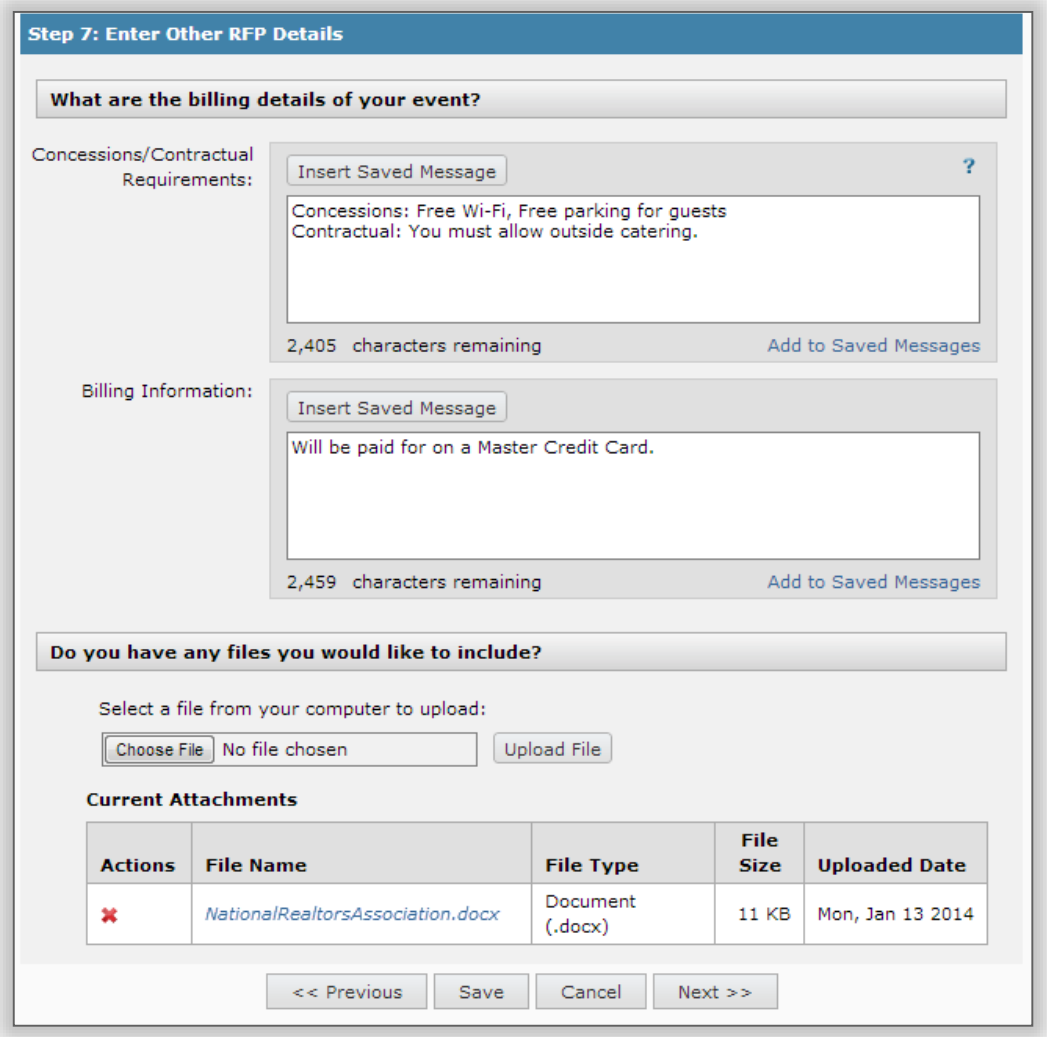
## Step 7: Billing Details

In the last step, complete any additional information regarding your contractual requirements and billing information. During this step, you can also choose to upload any additional attachments outlining any of your policies. Click **Next >>** to finish creating the RFP.




**TRY IT:** Create or copy your own RFP using the Create New RFP Wizard.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# Searching for Qualified Venues

Once you've created your RFP, the next step is to search for the venues to host your event. There are over 200,000 venues listed on the Supplier Network and Cvent offers you the tools to help narrow down the results into a manageable number. In this training, we will review the Destination Guide to narrow down the general location, the Promotions Hub to find the best deal, and the Supplier Search to apply additional filters to find the best venues.

## Destination Guide

Cvent's Destination Guide is your first stop to compare meeting-specific details across regions and cities. To access the Destination Guide, click **Destination Guide** in the toolbar.

Start your search by Region, such as the United States, or select a destination within the region, such as the Southeast US.

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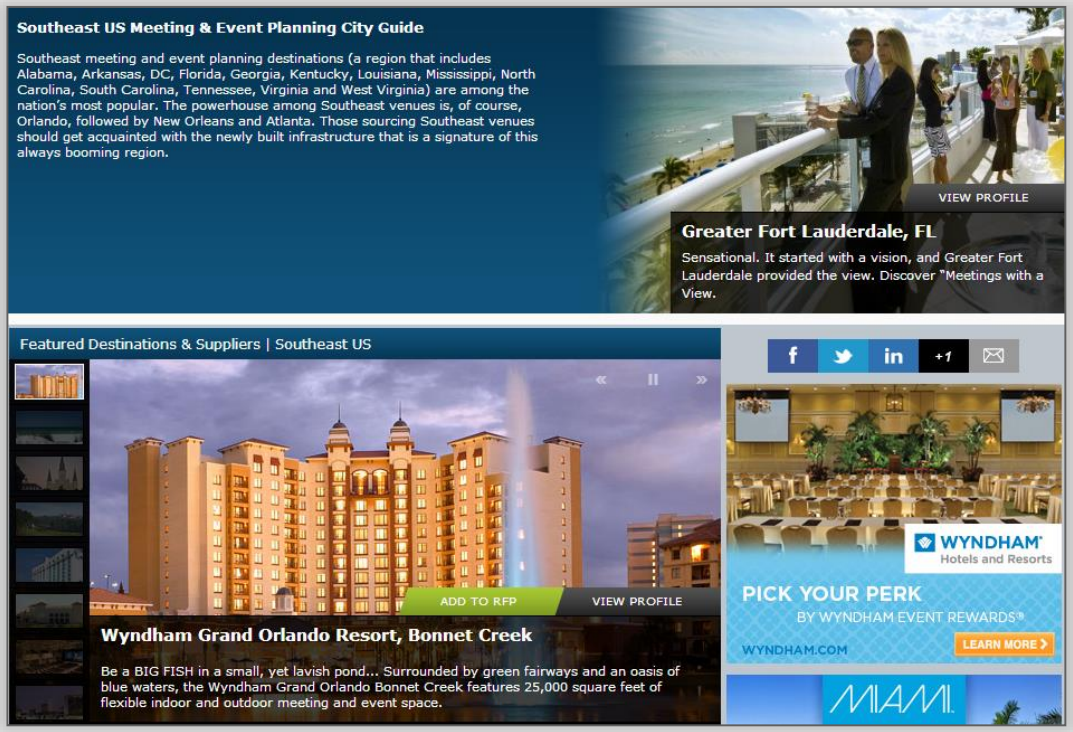
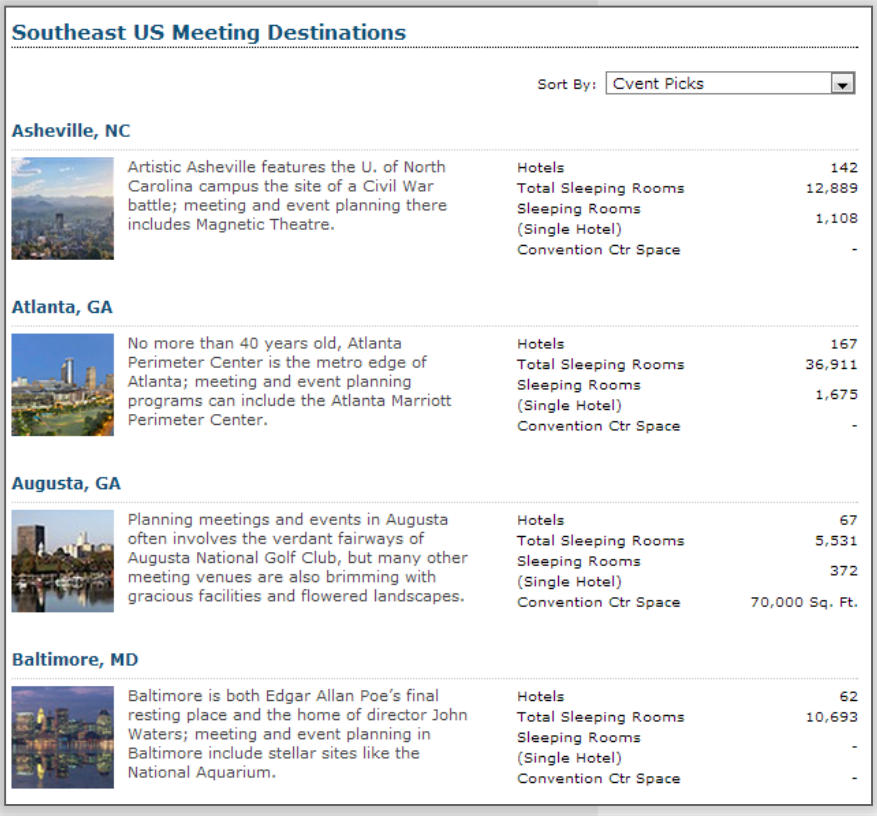
Clicking on a region such as the *Southeast US* brings you into a **Destination Profile**. In the top section, a brief summary of the region is listed, including its states. In the middle, you'll see a visual slide show of various suppliers profiled in the region.


Southeast US Meeting & Event Planning City Guide
Southeast meeting and event planning destinations (a region that includes Alabama, Arkansas, DC, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia and West Virginia) are among the nation's most popular. The powerhouse among Southeast venues is, of course, Orlando, followed by New Orleans and Atlanta. Those sourcing Southeast venues should get acquainted with the newly built infrastructure that is a signature of this always booming region.
VIEW PROFILE
Greater Fort Lauderdale, FL
Sensational. It started with a vision, and Greater Fort Lauderdale provided the view. Discover "Meetings with a View.
Featured Destinations & Suppliers | Southeast US
ADD TO RFP
VIEW PROFILE
Wyndham Grand Orlando Resort, Bonnet Creek
Be a BIG FISH in a small, yet lavish pond... Surrounded by green fairways and an oasis of blue waters, the Wyndham Grand Orlando Bonnet Creek features 25,000 square feet of flexible indoor and outdoor meeting and event space.
WYNDHAM Hotels and Resorts
PICK YOUR PERK
BY WYNDHAM EVENT REWARDS®
WYNDHAM.COM
LEARN MORE
MIAMI

Below that, you'll see a list of all of the Meeting Destinations in the region. View high level information such as the number of hotels, total sleeping rooms, and applicable convention center space on the main screen.

Click on the name or picture of any region to view a more detailed profile of the destination.

Within each city's profile, explore key highlights to narrow down your destination. Popular information includes key stats such as airports, convention center information, number of specialized venues, local attractions for your attendees, images of the area, and so much more!


Southeast US Meeting Destinations
Sort By: Cvent Picks
Asheville, NC
Artistic Asheville features the U. of North Carolina campus the site of a Civil War battle; meeting and event planning there includes Magnetic Theatre.
Hotels 142
Total Sleeping Rooms 12,889
Sleeping Rooms (Single Hotel) 1,108
Convention Ctr Space -
Atlanta, GA
No more than 40 years old, Atlanta Perimeter Center is the metro edge of Atlanta; meeting and event planning programs can include the Atlanta Marriott Perimeter Center.
Hotels 167
Total Sleeping Rooms 36,911
Sleeping Rooms (Single Hotel) 1,675
Convention Ctr Space -
Augusta, GA
Planning meetings and events in Augusta often involves the verdant fairways of Augusta National Golf Club, but many other meeting venues are also brimming with gracious facilities and flowered landscapes.
Hotels 67
Total Sleeping Rooms 5,531
Sleeping Rooms (Single Hotel) 372
Convention Ctr Space 70,000 Sq. Ft.
Baltimore, MD
Baltimore is both Edgar Allan Poe's final resting place and the home of director John Waters; meeting and event planning in Baltimore include stellar sites like the National Aquarium.
Hotels 62
Total Sleeping Rooms 10,693
Sleeping Rooms (Single Hotel) -
Convention Ctr Space -

**TRY IT:** Use the Destination Guide to search for a region or location to hold your next event.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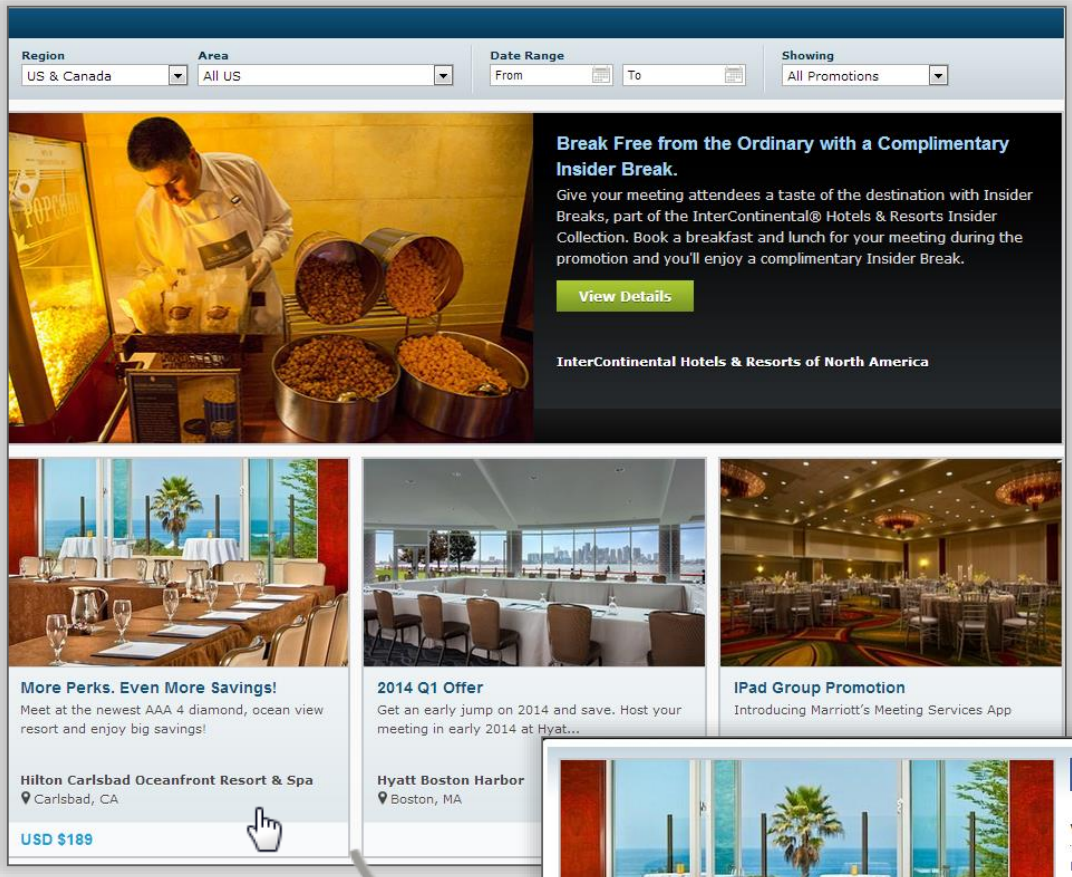
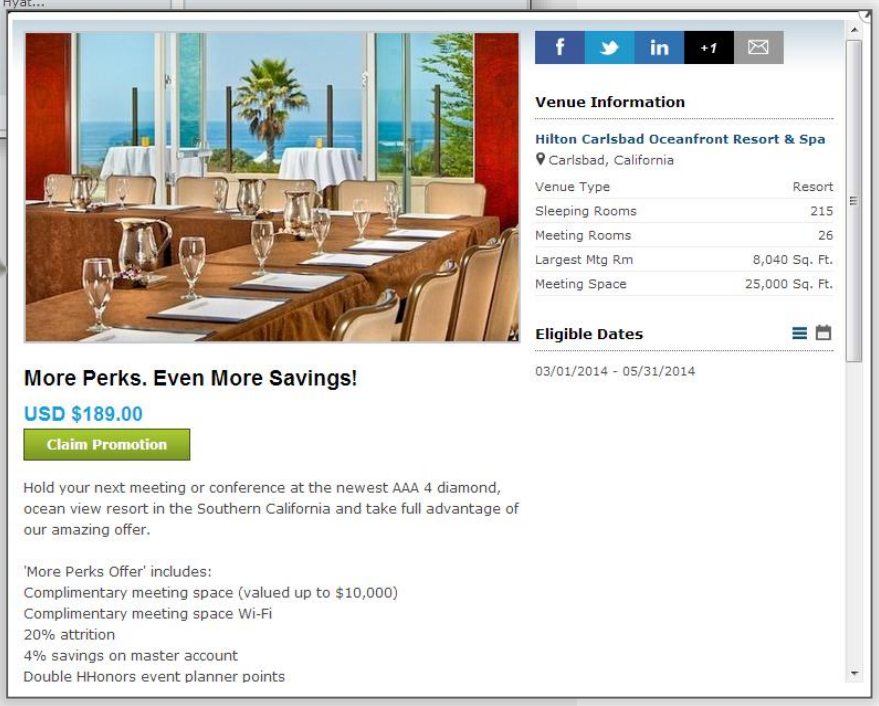
## Promotions Hub

Another option to narrow down your search results is through the **Promotions Hub**. You're always looking for the best deal for your organization—let Cvent help you with finding the suppliers with promotions. The Promotions Hub displays an extensive list of properties offering special promotions. To access this information, begin by clicking **Promotions** in the toolbar.

Filter through the promotions by searching by Region, Area, or the Date Range. To view more details about the promotion, click on the promotion box.


Region
US & Canada
Area
All US
Date Range
From
To
Showing
All Promotions
Break Free from the Ordinary with a Complimentary Insider Break.
Give your meeting attendees a taste of the destination with Insider Breaks, part of the InterContinental® Hotels & Resorts Insider Collection. Book a breakfast and lunch for your meeting during the promotion and you'll enjoy a complimentary Insider Break.
View Details
InterContinental Hotels & Resorts of North America
More Perks. Even More Savings!
Meet at the newest AAA 4 diamond, ocean view resort and enjoy big savings!
Hilton Carlsbad Oceanfront Resort & Spa
Carlsbad, CA
USD $189
2014 Q1 Offer
Get an early jump on 2014 and save. Host your meeting in early 2014 at Hyat...
Hyatt Boston Harbor
Boston, MA
IPad Group Promotion
Introducing Marriott's Meeting Services App


Venue Information
Hilton Carlsbad Oceanfront Resort & Spa
Carlsbad, California
Venue Type Resort
Sleeping Rooms 215
Meeting Rooms 26
Largest Mtg Rm 8,040 Sq. Ft.
Meeting Space 25,000 Sq. Ft.
Eligible Dates
03/01/2014 - 05/31/2014
More Perks. Even More Savings!
USD $189.00
Claim Promotion
Hold your next meeting or conference at the newest AAA 4 diamond, ocean view resort in the Southern California and take full advantage of our amazing offer.
'More Perks Offer' includes:
Complimentary meeting space (valued up to $10,000)
Complimentary meeting space Wi-Fi
20% attrition
4% savings on master account
Double HHonors event planner points

After reviewing the promotion details, click **Claim Promotion** to apply it to an RFP**.**

A new window appears and choose to either add this promotion **to an existing RFP** or to **add it to a new one.**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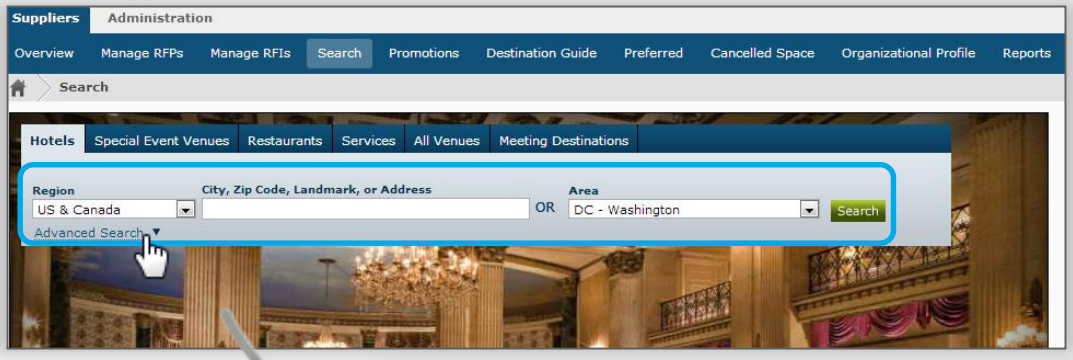
## Venue Search

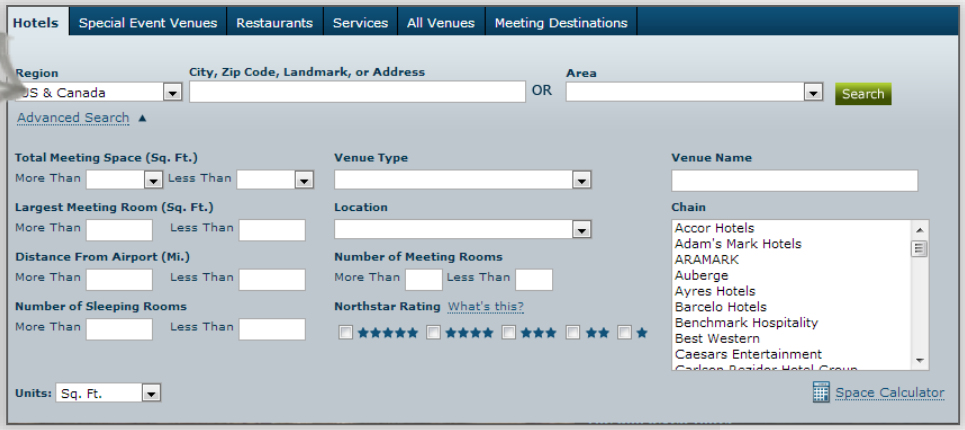
The third way to search for suppliers is through the **Venue Search**. This search gives you access to over 200,000 venues. Customize your search using a variety of search criteria ranging from region, major metro area, meeting space requirements, or hotel chain. To access the search, begin by clicking **Search** in the toolbar. Start your search by entering your Region, City, Landmark, or Major Metropolitan Area.

KEY TERM



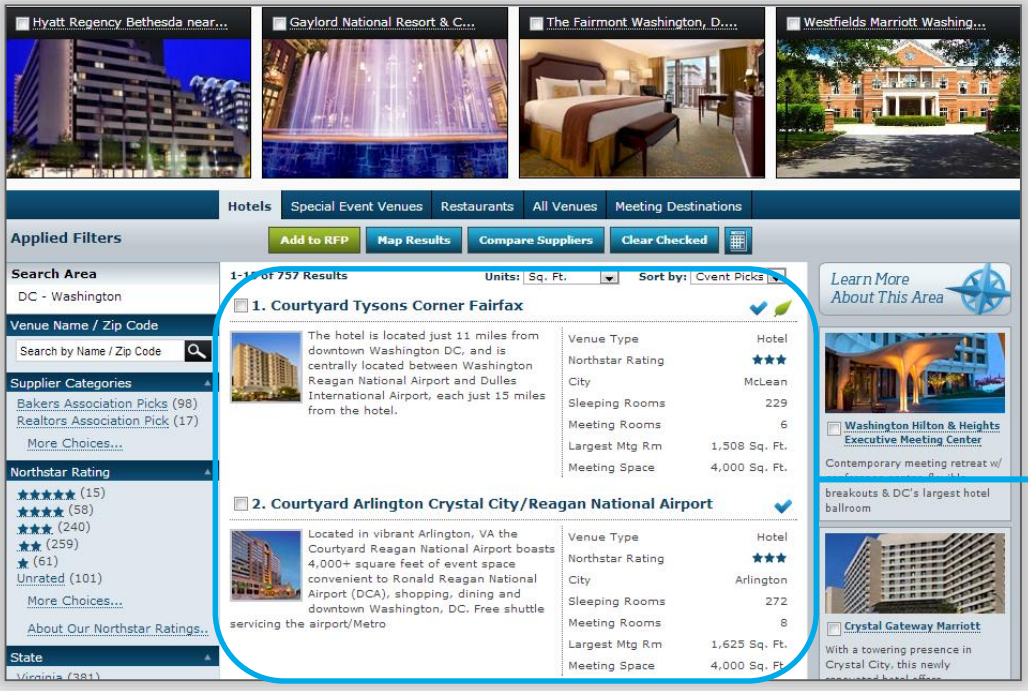

Looking for something more specific? Click **Advanced Search** to expand additional search criteria.

Select from a variety of search filters including total meeting space, largest meeting room, distance from airport, venue type, Northstar Rating, or Chain.




After entering in your criteria, click **Search.** Based on your filters, search results will display. In the middle of the screen are your **Natural Search Results**. These are the venues that closely matched your search criteria.

KEY TERM


Hyatt Regency Bethesda near...
Gaylord National Resort & C...
The Fairmont Washington, D....
Westfields Marriott Washing...
Hotels
Special Event Venues
Restaurants
All Venues
Meeting Destinations
Applied Filters
Add to RFP
Map Results
Compare Suppliers
Clear Checked
Search Area
DC - Washington
Venue Name / Zip Code
Search by Name / Zip Code
Supplier Categories
Bakers Association Picks (98)
Realtors Association Pick (17)
More Choices...
Northstar Rating
(15)
(58)
(240)
(259)
(61)
Unrated (101)
More Choices...
About Our Northstar Ratings...
State
Virginia (381)
Units: Sq. Ft.
Sort by: Cvent Picks
1. Courtyard Tysons Corner Fairfax
The hotel is located just 11 miles from downtown Washington DC, and is centrally located between Washington Reagan National Airport and Dulles International Airport, each just 15 miles from the hotel.
Venue Type Hotel
Northstar Rating
City McLean
Sleeping Rooms 229
Meeting Rooms 6
Largest Mtg Rm 1,508 Sq. Ft.
Meeting Space 4,000 Sq. Ft.
2. Courtyard Arlington Crystal City/Reagan National Airport
Located in vibrant Arlington, VA the Courtyard Reagan National Airport boasts 4,000+ square feet of event space convenient to Ronald Reagan National Airport (DCA), shopping, dining and downtown Washington, DC. Free shuttle servicing the airport/Metro
Venue Type Hotel
Northstar Rating
City Arlington
Sleeping Rooms 272
Meeting Rooms 8
Largest Mtg Rm 1,625 Sq. Ft.
Meeting Space 4,000 Sq. Ft.
Learn More About This Area
Washington Hilton & Heights Executive Meeting Center
Contemporary meeting retreat w/ breakouts & DC's largest hotel ballroom
Crystal Gateway Marriott
With a towering presence in Crystal City, this newly

***Natural Search Results***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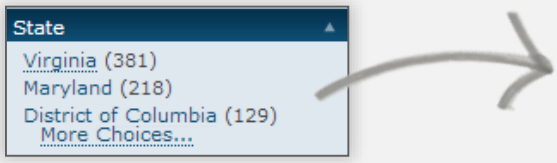
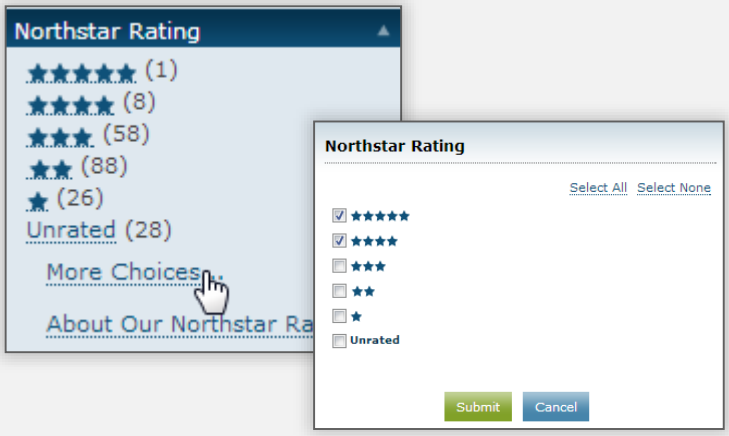
Narrow down your results even further using the filters on the left. To apply a single choice from a filter, simply click on the hyperlinked name. To apply multiple choices from a filter, select **More Choices** and check off the desired responses.




Once the state filter for Maryland is applied, the search results decrease from ***757 to 218.***

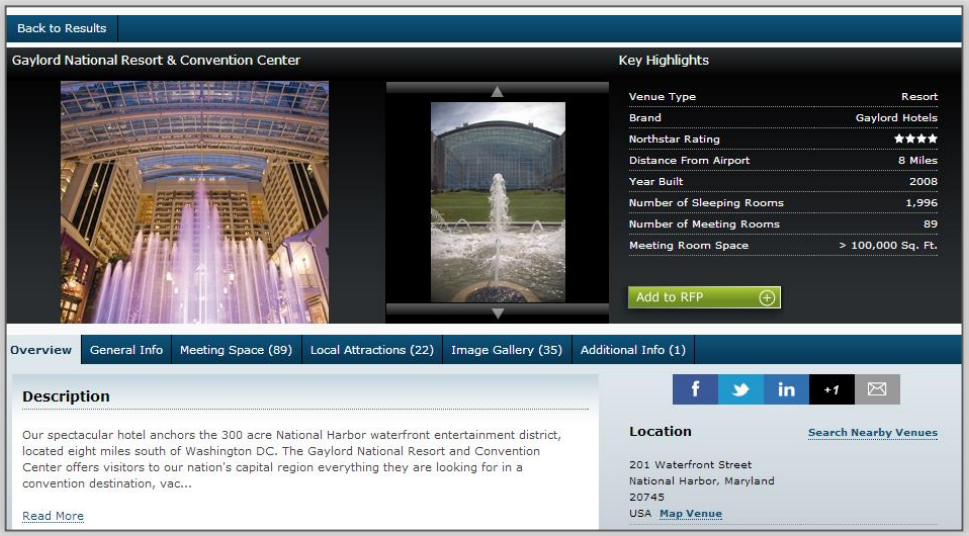
Additionally, if only four and five star ratings should be considered, select **More Choices** from the Northstar Rating Filter. Then, check off four and five stars. Click **Submit** and the choices are now reduced to nine.




In addition to the natural search results, you'll also notice venues streaming across the top and right hand side. These are our three and four diamond properties that are promoting their venues.

To view more information about any of the properties, click on the property name. View extensive details about the venue ranging from amenities, meeting space and lodging statistics, potential meeting room configurations, local attractions, images, and more.

Click **Back to Results** to view the remaining properties and select the ones that you're interested in sending an RFP.


Back to Results
Gaylord National Resort & Convention Center
Key Highlights
Venue Type Resort
Brand Gaylord Hotels
Northstar Rating
Distance From Airport 8 Miles
Year Built 2008
Number of Sleeping Rooms 1,996
Number of Meeting Rooms 89
Meeting Room Space > 100,000 Sq. Ft.
Add to RFP
Overview
General Info
Meeting Space (89)
Local Attractions (22)
Image Gallery (35)
Additional Info (1)
Description
Our spectacular hotel anchors the 300 acre National Harbor waterfront entertainment district, located eight miles south of Washington DC. The Gaylord National Resort and Convention Center offers visitors to our nation's capital region everything they are looking for in a convention destination, vac...
Read More
Location
Search Nearby Venues
201 Waterfront Street
National Harbor, Maryland
20745
USA Map Venue

*All venue profiles are set up in the same format to simplify comparing details.*

**TRY IT:** Search for venues using the advanced filters.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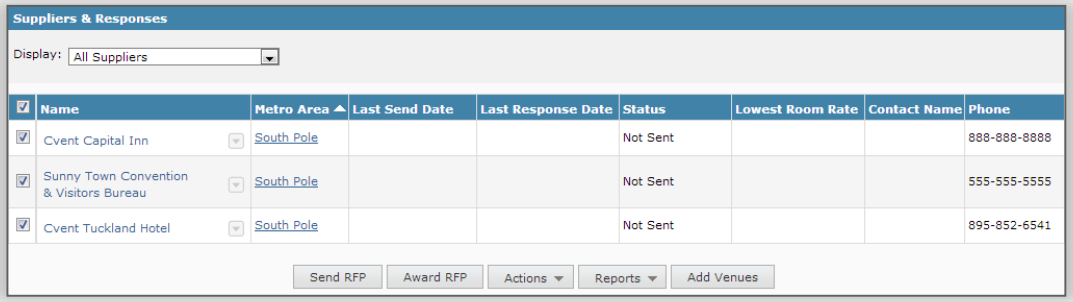
# Sending an RFP to the Selected Venues

The last section of this training discusses sending an RFP to the venues selected during your search.

Once you've associated all of the venues to your RFP, it's time to send out the RFP. To do this, begin by reviewing the associated suppliers by selecting **Manage RFPs** in the toolbar. Click on the RFP name that you've been working with and select **Suppliers & Responses** on the left, under section links.




Click **Send RFP.** On the next screen, you'll see any venues that may conflict with your meeting requirements. Select the suppliers to acknowledge the message or choose to deselect them, then click **Next >>.**

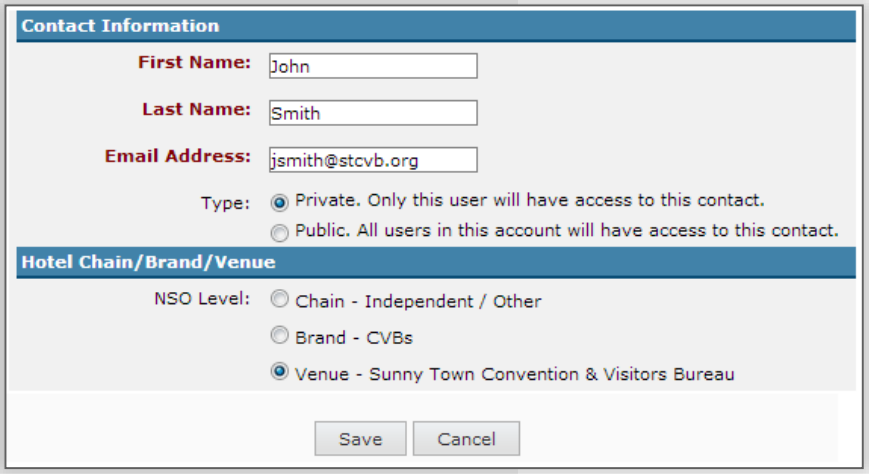
In the Send RFP Confirmation screen, choose to associate any additional contacts to this RFP. Click **Add new contact** to add their information.

Send RFP Confirmation
You are about to send the National Realtors Meeting* RFP to the following suppliers.
CVB forward limit: Not set
Contact
Contact Type
Short Description
Sunny Town Convention & Visitors Bureau
Supplier Contacts (View)
Supplier
Add new contact

Choose to add the information for a new **National Sales Office Contact (NSO).**

Enter the contact's first name, last name, email address and indicate if other users should have access to this contact.

Then, select the contact's hotel chain/brand/venue association and click **Save.**




Enterprise Feature

NSO Contacts are an Enterprise feature. To learn more about adding this feature to your account, please contact your Relationship Manager.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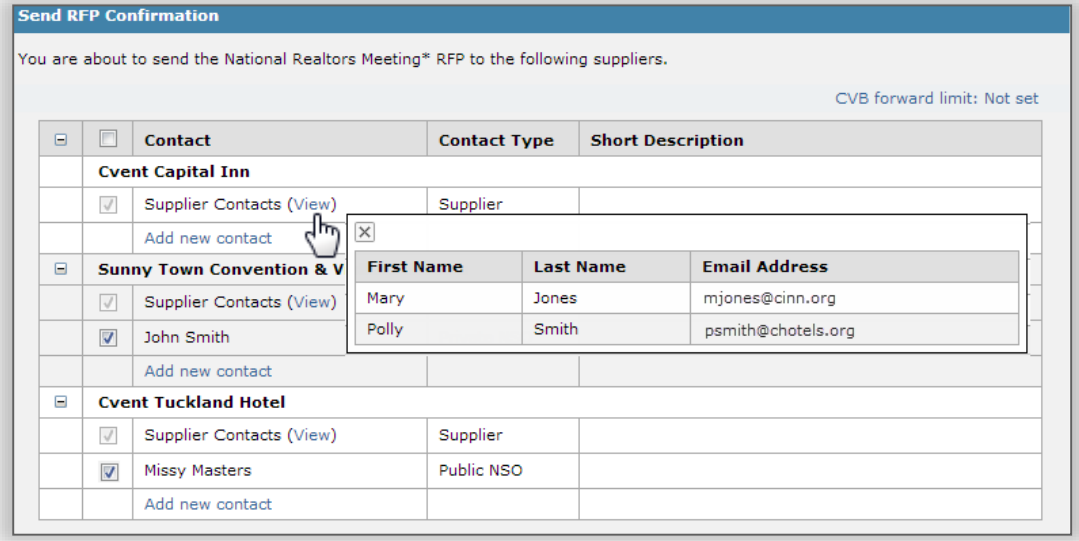
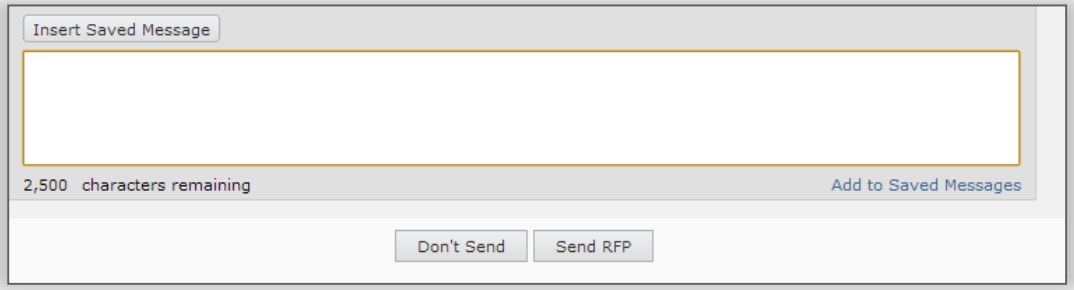
Additionally, to view the contacts assigned to the selected suppliers or lead catchers, click **(View)** to the right of Supplier Contacts.




Before sending the RFP, choose to add an additional message to the selected contacts. Choose to insert a previously saved message by selecting **Insert Saved Message**, or enter in a new message. Click **Send RFP** when finished.




*Review any associated messages to this RFP by clicking **Manage RFPs > RFP Name > Message History.***

**TIP:** Save time by inserting saved messages with pre-configured messages by selecting **Insert Saved Message.**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# Glossary of Key Terms and Definitions

| Term | Definition |
|---|---|
| **Advanced RFP** | A form that allows you to add an extensive amount of details about your event including contractual requirements, decision factors, specific meeting room sizes and setup, and much more. |
| **Custom Questions** | Additional questions that are created to ask suppliers unique information during the RFP process. |
| **Decision Date** | This is the date the planner expects to award the business to a specific supplier. |
| **Destination Guide** | This extensive database contains information for potential meeting locations. Compare meeting destinations based on their city exhibit space, average daily costs, local attractions, and more. This is accessed by clicking Destination Guide in the toolbar. |
| **Destination Profile** | An individual page dedicated to each meeting destination. Each Destination Profile is configured in the same format to promote consistency using tabs to display Key States, Meeting Room Configurations, Transportation Information, and more. |
| **Natural Search Results** | These venues are the closest matches to your supplier search criteria. All Natural Search Results appear in the middle of the supplier search results screen. |
| **Promotions Hub** | This resource contains all promotions across all venues. Filter promotions by their location or date range. This is accessed by clicking Promotions in the toolbar. |
| **Quick RFP** | A simple form that requires the basic information about your event. |
| **Response Due Date** | This is the date supplier responses are due for this RFP. |
| **Venue Search** | Use the Venue Search to filter 200,000 venues into a manageable number for your event. This can be accessed by clicking Search in the toolbar. |


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# Planner Training II: Responses, Reporting, & Awarding RFPs

Cvent, Inc
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McLean, VA 22102
www.cvent.com

# Familiarize Yourself

Before watching this video, it is recommended that you have reviewed the first part of the CSN Planner Training series and understand its core objectives.

## Planner Training I: Creating, Searching, & Sending RFPs

- Navigate the different sections within your account.
- Create a request for a proposal in your Cvent account.
- Identify how creating an RFP creates leads in an organized format.
- Search for qualified venues via the Destination Guide, Promotions Hub, or Supplier Search.
- Locate suppliers that can accommodate the details included in your RFP.
- Send your RFP to selected venues.
- Recognize how sending your RFP in one format helps successfully track suppliers in a centralized location.


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# Introduction

## Common Obstacles

This training has been developed based on common obstacles experienced by our customers. Before continuing with this video, think about the following questions and how they apply to planner's daily tasks.

## Have you ever experienced difficulty or obstacles with…

- Managing and tracking de-centralized responses?
- Comparing proposals in apples-to-apples manner?
- Repeating communication with venues on the business outcome?

## What will be covered in this training?

This is the second of three videos in the CSN Planner Training series. In this video, you will learn to manage supplier responses, report on supplier information, and determine the best action for the RFP business. After completing this training you will be able to:

- Manage supplier responses by identifying the different available actions.

**APPLY IT:** Perform actions to suppliers in bulk and track all supplier communications.

- Run bid comparison reports.

**APPLY IT:** Compare all proposal information in a single, organized format.

- Determine if you should award or cancel your RFP business.

**APPLY IT:** Track the outcome of your business and measure your success.


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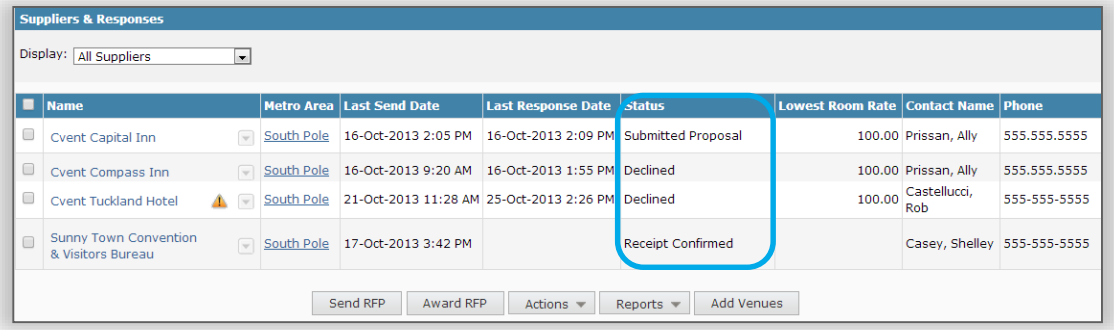
# Managing and Tracking Supplier Responses

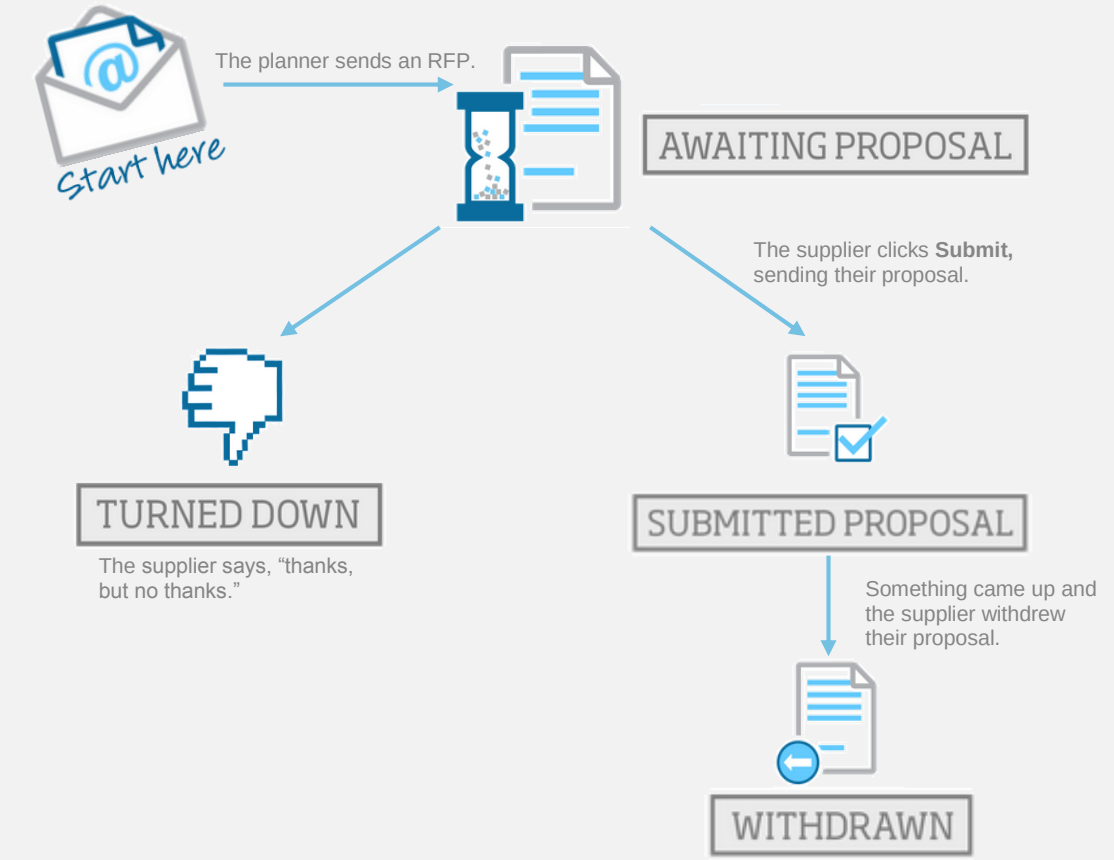
After you've sent out an RFP to your selected venues, you'll want to keep track of their comments and responses. Easily view all of this information on the Suppliers & Responses page. To view this page, begin by clicking **Manage RFPs** in the toolbar and click on the RFP name.

Select **Suppliers & Responses** on the left, under section links to view all of the suppliers associated to the RFP. A dashboard appears with information for each supplier including the Metro Area, Last Send Date, Last Response Date, Status, Lowest Room Rate, Contact Name, and Phone Number.

## Supplier Statuses

Each supplier associated to the RFP has their own status listed in the table. Here, you may notice different statuses displayed for each different suppliers. These statuses related to the supplier's decision to your RFP. We will discuss several of the most commonly used statuses.





Start here
The planner sends an RFP.
AWAITING PROPOSAL
The supplier clicks Submit, sending their proposal.
TURNED DOWN
The supplier says, "thanks, but no thanks."
SUBMITTED PROPOSAL
Something came up and the supplier withdrew their proposal.
WITHDRAWN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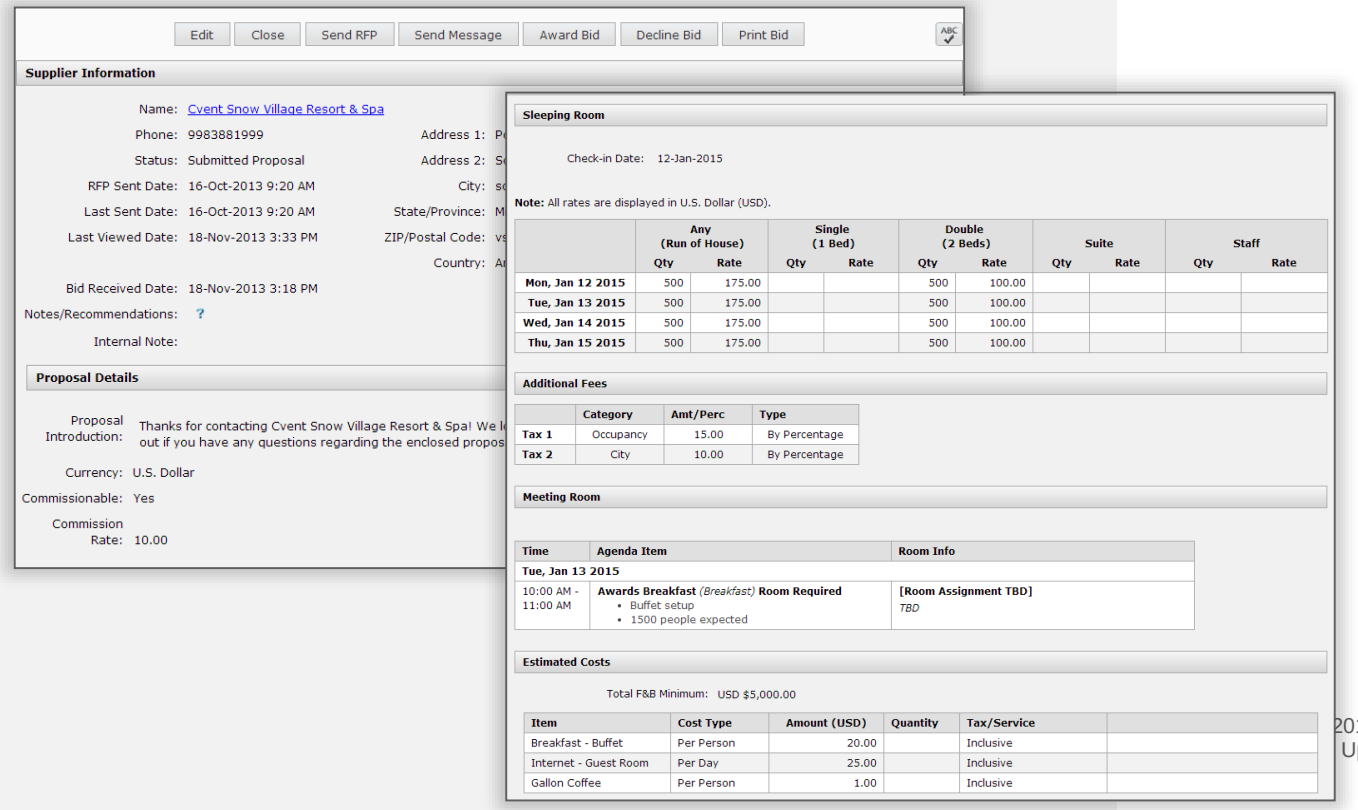
| Status | Definition |
|---|---|
| **Submitted Proposal** | The supplier responded with a bid to your RFP. |
| **Awaiting Proposal** | The venue has not yet responded to your RFP. |
| **Awaiting Proposal-In Progress** | The venue has acknowledged your RFP and will respond. |
| **Turn Down** | The venue cannot accommodate the request. |
| **Withdrawn** | The venue has retracted their proposal because they can no longer accommodate the request. |

## Viewing Responses

After a venue sends you a proposal, their status immediately changes to submitted proposal. To view the details of their proposal, click on the venue name within the Suppliers & Responses page. On this page, view all of their completed proposal details, including the meeting room and sleeping room information and responses to any of your custom questions.





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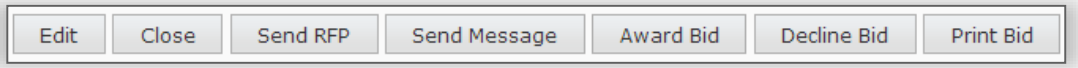
In addition to viewing the proposal details, you can also take several actions towards this individual supplier's proposal. Choose to send the RFP, send an additional message, award the bid, decline the bid, or print the bid.




| Action | Definition | Scenario |
|---|---|---|
| **Send RFP** | Send request for proposal information to the supplier. | You have not sent the RFP to this supplier yet, and want to receive their proposal for your event. |
| **Send Message** | Send additional information via email to the supplier. | You would like to complete a site visit to this venue and want to discuss logistics with the supplier. |
| **Award Bid** | Accept the bid sent from the supplier. | After reviewing the supplier's bid, you have decided to use this venue for your event. |
| **Decline Bid** | Deny the bid sent from the supplier | After reviewing multiple bids, you have decided to not use this venue for your event. |
| **Print Bid** | View the bid in a printer friendly format. | You need to show the price quote to your supervisor and will not have computer access to your meeting and need to print a hard copy. |

**TIP:** Apply these actions to multiple suppliers from the Suppliers & Responses page.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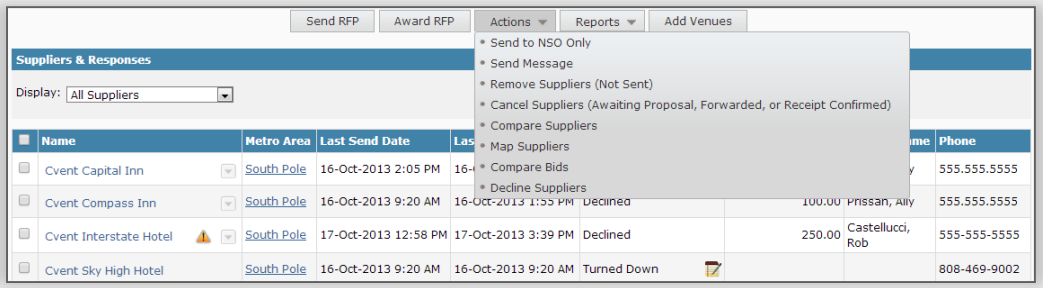
## Bulk Actions

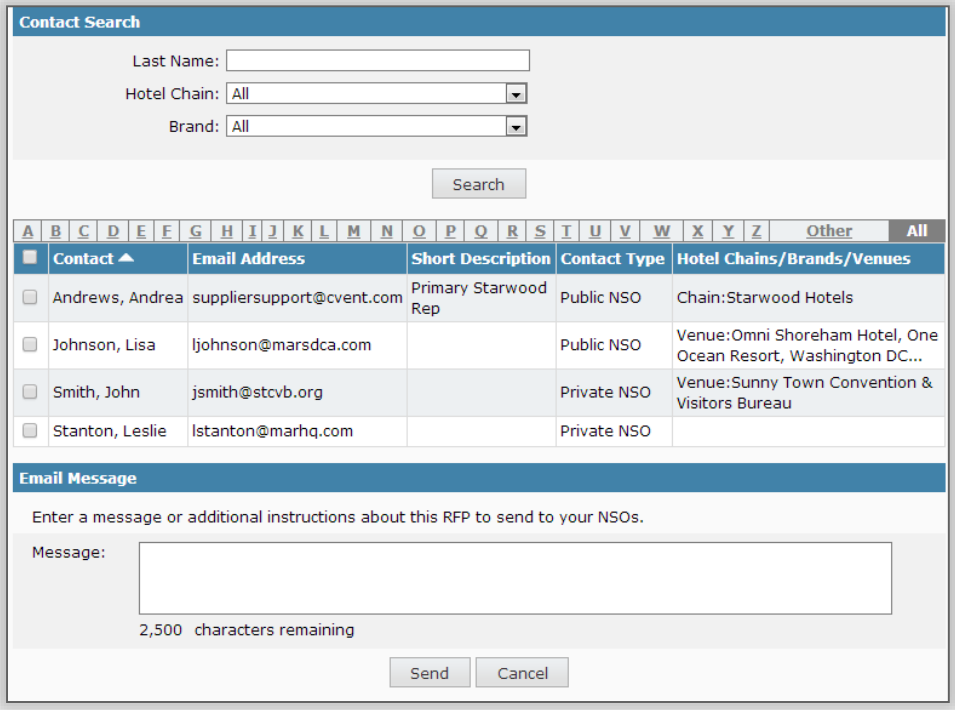
Moving back to the **Suppliers & Responses** page, save time by applying any of the aforementioned actions to multiple suppliers at once or apply several new actions. To apply the action, check off the venues and then select the appropriate action from the dropdown.




## Send to NSO Only

Rather than sending your RFP to an individual property, choose to send it a specific NSO contact. This allows the NSO to forward the RFP through Cvent to the appropriate suppliers. For example, if you have already a conversation with the NSO and would prefer them to send the opportunity to the hotels within their brand, this option is ideal.

Begin by selecting **Send to NSO Only** from the Actions dropdown. Search for the NSO contact and select their name. Enter in a message or additional instructions about this RFP and click **Send.**




**APPLY IT:** Do you have any NSO contacts that you would prefer to send your RFP to?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## Send Message

Choose to send an additional message to a group of suppliers. This is ideal to provide suppliers with additional details about your RFP or your internal processes for awarding RFP business.

**NOTE:** All replies to the initial message will be directed back to the key contact email address associated to this RFP. ***These replies are not tracked in message history.***

Begin by selecting the suppliers and choose **Send Message** from the **Actions** dropdown. Then, enter in your message content. If you anticipate using this message in the future, check, **Save this message for later use,** to store this message in your account.



**TIP:** Cvent automatically stores all of your message content in your message history. View the message history in ***Manage RFPs > RFP Selection > Message History.***

## Consolidate Suppliers

When you want to clean up your list of suppliers, choose to remove and decline suppliers in bulk. For the suppliers that have not been sent an RFP, select to remove them from your list. Choose to cancel the RFP sent to suppliers if they are in awaiting proposal, forwarded, or receipt confirmed statuses. Lastly, choose to decline suppliers if you know that you're not going to move forward with their proposal.


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# Comparing Bids

As you're receiving bids from multiple suppliers, it may be difficult to decide which venue is best for your event. Cvent provides several bid comparison reports to view bids side-by-side in easy to read, organized formats.

To run any of the comparison reports, begin by selecting the venues to compare. Then, from the **Reports** dropdown, select the report to run. Majority of the reports will provide a pop-up to select additional fields to pull into the report and can be exported into Excel to easily manipulate the data.

## Compare Suppliers Report

This report contains summary information about the suppliers. It is ideal to use during the beginning stages of your sourcing process because it does not contain information about the proposal.

| **Supplier Information** | | |
|---|---|---|
| Name: | Cvent Capital Inn | Cvent Snow Village Resort & Spa |
| Image: | | |
| Supplier Type: | Hotel | Luxury Hotel |
| Chain: | Independent / Other | Independent / Other |
| Brand: | Independent | Other Affiliation |
| Website: | view website | view website |
| City, State: | South Pole | south pole, Michigan |
| Supplier Categories: | | |
| Preferred: | No | No |
| **Awards and Ratings** | | |
| AAA Rating: | 4 Diamonds | 5 Diamonds |
| Forbes Rating: | 4 Stars | 5 Stars |
| **Meeting Space** | | |
| Meeting Room Space: | 12,000 Sq. Ft. | > 100,000 Sq. Ft. |
| Number of Meeting Rooms | 16 | 1,000 |
| **Lodging Information** | | |
| Number of Sleeping Rooms: | 444 | 900 |
| Number of Suites: | 32 | 200 |
| Number of Single Rooms: | - | 350 |
| Number of Double Rooms: | 181 | 400 |

## Availability Report

This report displays a summary view of dates, rates, and overall availability that the venues have submitted. It is ideal when comparing venues on numerically-focused data.

| Status | Supplier | Image | Availability | Proposed Dates | Room Rate | Sleeping Room Cost | F&B Minimum |
|---|---|---|---|---|---|---|---|
| South Pole | | | | | | | |
| Submitted Proposal | Cvent Capital Inn | | Available 1st Option | 13-Jan-2015 to 16-Jan-2015 | USD $100.00 | USD $400,000.00 | |
| Submitted Proposal | Cvent Snow Village Resort & Spa | | Available 1st Option | 13-Jan-2015 to 16-Jan-2015 | USD $100.00 - USD $175.00 | USD $550,000.00 | USD $5,000.00 |
| *Alternate Date/Rate | | | | | | | |


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## View Bids Report

This report is a comprehensive display of all venue background information and proposal information for each status. Each proposal status is displayed in its own tab within the Excel worksheet.

**National Realtors Meeting - Submitted Proposals**

RFP Code: F9NF3FNNPVV
*National Realtors Meeting*
Event Dates: 13-Jan-2015 to 16-Jan-2015
Prepared By: Client Services

**Supplier Information**

| Name: | Cvent Capital Inn | Cvent Snow Village Resort & Spa |
|---|---|---|
| Image: | | |
| Supplier Type: | Hotel | Luxury Hotel |
| Chain: | Independent / Other | Independent / Other |
| Brand: | Independent | Other Affiliation |
| Website: | View Website | View Website |
| Address: | 109 winter way<br>South Pole<br>Antarctica | Post Box No. 2117<br>South Male Atoll<br>south pole, Michigan, vsvs489742<br>Antarctica |
| Total Guest Rooms: | 444 | 900 |
| Total Meeting Space: | 12,000 Sq. Ft. | > 100,000 Sq. Ft. |
| Largest Meeting Room: | 12,000 Sq. Ft. | 65,000 Sq. Ft. |

## RFP & Bids Report

This report displays all of the RFP information at the top of the screen followed by the submitted proposal details in a Word document.

**National Realtors Meeting**
National Realtors Association

cvent Supplier Network
Request For Proposal

**RFP Details**

| | |
|---|---|
| **RFP Name** | National Realtors Meeting |
| **Response Due Date** | Sat, 01-Nov-2014 |
| **Decision Date** | Sat, 15-Nov-2014 |
| **RFP Type** | Meeting Space and Sleeping Rooms |
| **RFP Code** | F9NF3FNNPVV |
| **Description** | This is a yearly meeting where the memb in the real estate industry as well as to ho |
| **Decision Factors** | Must be at least 10 miles from the airport |
| **Billing Information** | Will be paid for on a Master Credit Card. |
| **Concessions / Contractual Requirements** | Concessions: Free Wi-Fi, Free parking fo |

**Key Contact Information**

| | |
|---|---|
| **Contact Name** | Sally Smith |
| **Organization** | Plan4U |
| **Title** | Lead Sourcer |
| **Address** | 1800 Sunset Road□Sunsberry, NV USA |
| **Additional Information** | Please contact me only through phone fo contact me via email. Thank You. |

**National Realtors Meeting**
Proposal from Cvent Capital Inn

**Proposal Details**

| | | | |
|---|---|---|---|
| **RFP Name** | National Realtors Meeting | | |
| **RFP Code** | F9NF3FNNPVV | | |
| **Event Name** | National Realtors Meeting | | |
| **Proposal Sent Date** | Wed, 16-Oct-2013 2:09 PM | **Proposal Status** | Submitted Proposal |
| **Supplier Name** | Cvent Capital Inn | **Supplier Type** | Hotel |
| **Chain** | Independent / Other | **Metro Area** | South Pole |
| **Brand** | Independent | **Commission?** | Yes - 10.00% |
| **Proposal Introduction** | Thank you very much for considering the Cvent Capital Inn for your event. We greatly appreciate your request and look forward to the prospect of working together. | | |

| Date Type | Event Dates | Check-In Date | Availability | Rates (USD) |
|---|---|---|---|---|
| Preferred | Tue, 13-Jan-2015 to Fri, 16-Jan-2015 | Mon, 12-Jan-2015 | Available 1st Option | 100.00 |

| | |
|---|---|
| **Additional Information** | We are holding space for you for the required dates. |
| **Concessions / Contractual Requirements** | ~ 20% allowable attrition ~ Allowable room block reduction clause ~ Earned comps (1/40 preferred, prefer to have these as a credit to the master) ~ |

**Key Contact Information**

| | | | |
|---|---|---|---|
| **Contact Name** | Ally Prissan | **Email Address** | suppliersupport@cvent.com |
| **Organization** | Cvent Sky High Hotel | **Phone** | 555.555.5555 |
| **Title** | Sales Manager | | |
| **Additional Information** | Please feel free to call or email with questions!□□For immediate assistance please reach out to Supplier Support @ 866-318-4357 | | |


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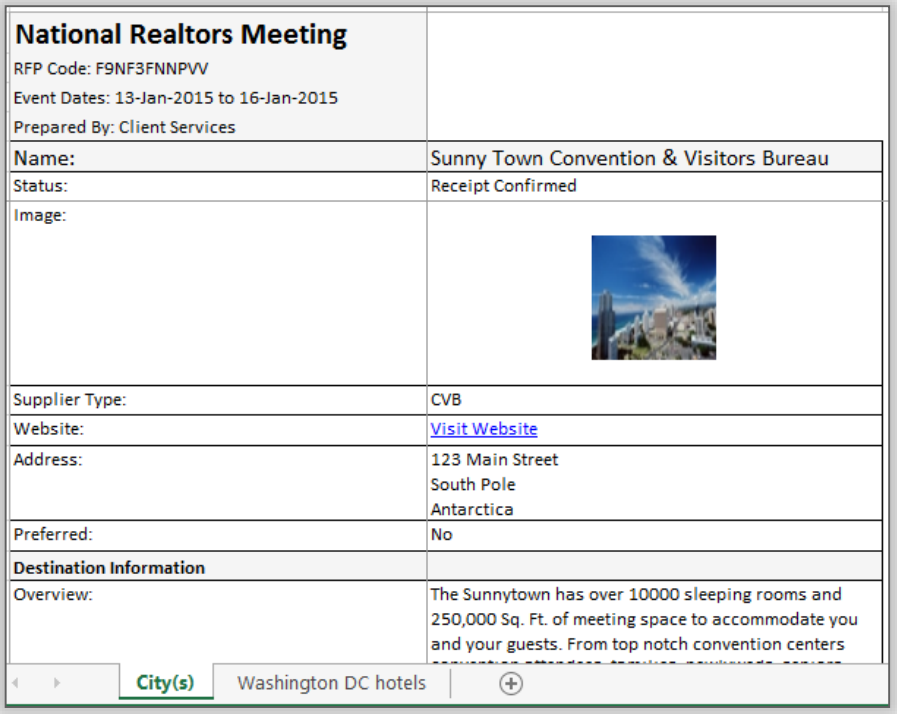
## Responses by Destination Report

This report was designed with citywide RFPs in mind, but is available to all advanced and quick RFPs. It displays a comprehensive list of information ranging from rate information to hotels over multiple major metropolitan areas. It is ideal when comparing hotels, cities (CVBs), and conference centers.



**National Realtors Meeting**
RFP Code: F9NF3FNNPVV
Event Dates: 13-Jan-2015 to 16-Jan-2015
Prepared By: Client Services

| | |
|---|---|
| Name: | Sunny Town Convention & Visitors Bureau |
| Status: | Receipt Confirmed |
| Image: | |
| Supplier Type: | CVB |
| Website: | Visit Website |
| Address: | 123 Main Street<br>South Pole<br>Antarctica |
| Preferred: | No |
| **Destination Information** | |
| Overview: | The Sunnytown has over 10000 sleeping rooms and 250,000 Sq. Ft. of meeting space to accommodate you and your guests. From top notch convention centers |

City(s) | Washington DC hotels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# Closing RFP Business

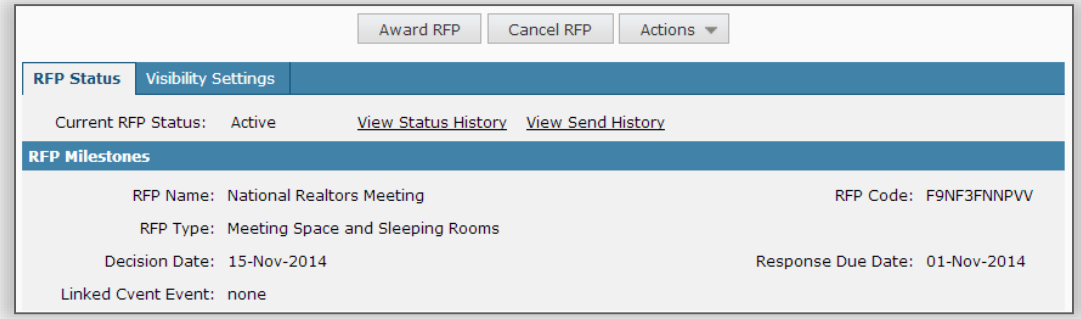
The last step in the RFP lifecycle is closing the business. Closing the RFP business allows you to communicate with suppliers who has won your business.

When closing the business, you can take one of two actions. Decide to cancel your RFP or award a supplier with your business.

## Cancelling Your RFP

When the unexpected happens, your event may need to be cancelled. If you find yourself in this situation, you'll need to notify all suppliers associated to your RFP. To do this, click into your RFP and select **RFP Administration** on the left, under section links.

Click **Cancel RFP** and provide the **cancellation reason** such as event postponed. Add any additional comments and click **Confirm Cancel RFP.**




**NOTE:** After confirming the RFP cancellation, it **cannot be retracted**. In order to reuse this RFP after it's been cancelled, a new RFP must be created.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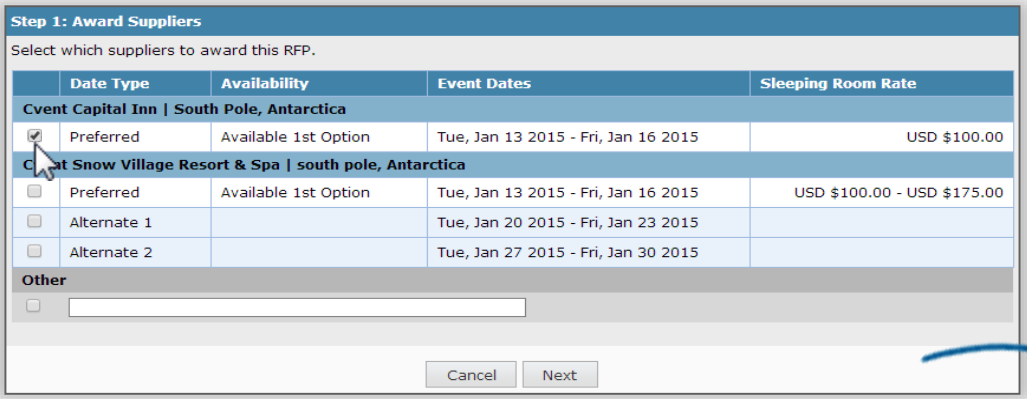
## Awarding Your RFP

It is more likely that you will be awarding your RFP to the supplier that you feel deserves your business. Awarding your RFP alerts the winning bidder they have your business and will notify the others of why they lost out.

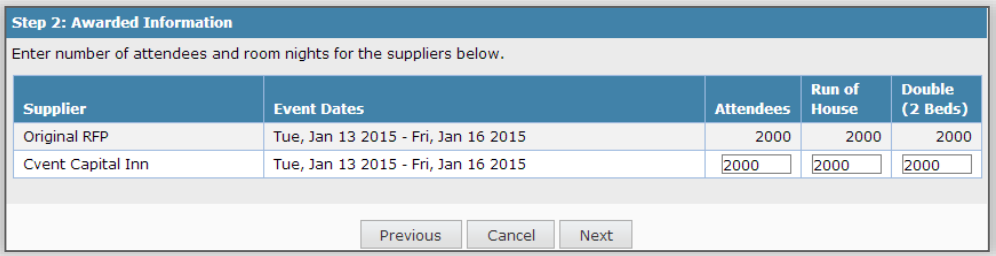
Awarding an RFP can be completed on the RFP Administration page, or via the Supplier & Responses page. From either location, click **Award RFP** to complete the Awarding Wizard.

In Step 1, check the boxes next to the winning venues' Preferred or Alternate dates. Click **Next.**

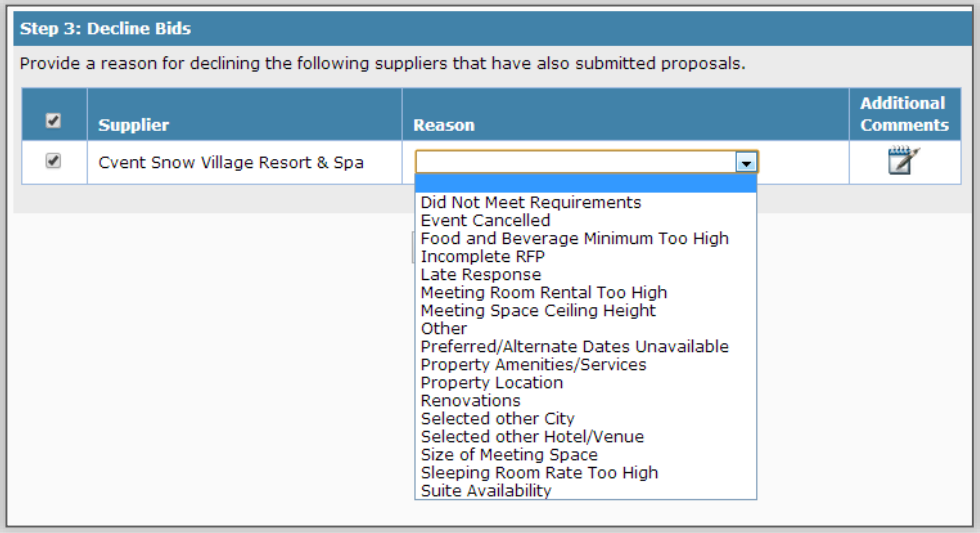

Step 1: Award Suppliers
Select which suppliers to award this RFP.
Date Type
Availability
Event Dates
Sleeping Room Rate
Cvent Capital Inn | South Pole, Antarctica
Preferred
Available 1st Option
Tue, Jan 13 2015 - Fri, Jan 16 2015
USD $100.00
Snow Village Resort & Spa | south pole, Antarctica
Preferred
Available 1st Option
Tue, Jan 13 2015 - Fri, Jan 16 2015
USD $100.00 - USD $175.00
Alternate 1
Tue, Jan 20 2015 - Fri, Jan 23 2015
Alternate 2
Tue, Jan 27 2015 - Fri, Jan 30 2015
Other
Cancel
Next

*Select **Other** to award the business to an outside supplier and enter the venue's name.*

In Step 2, confirm the number of attendees and rooms. Click **Next.**




In Step 3, notify the other suppliers who submitted proposals of why you will not be awarding their business. Select a reason for each supplier and add any additional comments using the notepad icon. Click **Next.**





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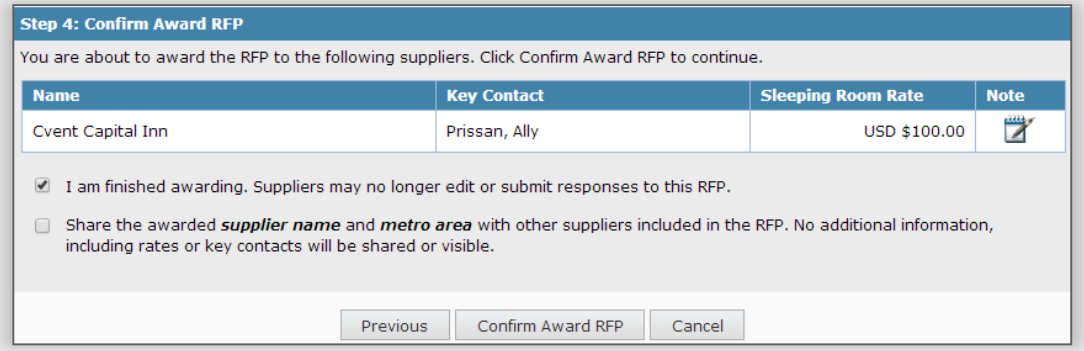
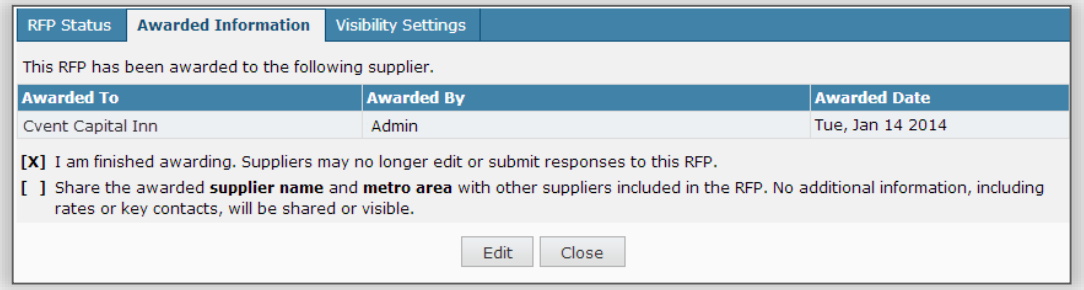
In Step 4, confirm that you are finished awarding this RFP and click **Confirm Award RFP.**


Step 4: Confirm Award RFP
You are about to award the RFP to the following suppliers. Click Confirm Award RFP to continue.
Name
Key Contact
Sleeping Room Rate
Note
Cvent Capital Inn
Prissan, Ally
USD $100.00
I am finished awarding. Suppliers may no longer edit or submit responses to this RFP.
Share the awarded supplier name and metro area with other suppliers included in the RFP. No additional information, including rates or key contacts will be shared or visible.
Previous
Confirm Award RFP
Cancel

After confirming the awarding, a new tab, **Awarded Information,** appears in the middle of the screen. This serves as a historical reference for you to review who the RFP was awarded to, who awarded it along with the date it was awarded.


RFP Status
Awarded Information
Visibility Settings
This RFP has been awarded to the following supplier.
Awarded To
Awarded By
Awarded Date
Cvent Capital Inn
Admin
Tue, Jan 14 2014
[X] I am finished awarding. Suppliers may no longer edit or submit responses to this RFP.
[ ] Share the awarded supplier name and metro area with other suppliers included in the RFP. No additional information, including rates or key contacts, will be shared or visible.
Edit
Close

Finally, to review the contract status, click **Contracted Information** on the left, under section links. This page displays a summary of the contract details. To modify any of the information displayed here, simply click **Edit** from the dropdown menu next to the venue name.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# Glossary of Key Terms and Definitions

| Term | Definition |
|---|---|
| **Awaiting Proposal Status** | The venue has not yet responded to your RFP. |
| **Awaiting Proposal – In Progress Status** | The venue has acknowledged your RFP and will respond. |
| **Award [RFP]** | After receiving bids from suppliers, select the preferred bid for your event by awarding it. |
| **Cancel [RFP]** | If your event will no longer be happening, notify your associated suppliers by cancelling the RFP. |
| **Submitted Proposal Status** | The supplier responded with a bid to your RFP. |
| **Turned Down Status** | The venue cannot accommodate the request. |
| **Withdrawn Status** | The venue has retracted their proposal because they can no longer accommodate the request. |


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# Planner Training III: RFP Tips 'N' Tricks

## FEBRUARY 2014

Cvent, Inc
8180 Greensboro Drive
McLean, VA 22102
www.cvent.com

# Familiarize Yourself

Before watching this video, it is recommended that you have reviewed the first and second parts of the CSN Planner Training series and understand their core objectives.

## Planner Training I: Creating, Searching, & Sending RFPs

- Navigate the different sections within your account.
- Create a request for a proposal in your Cvent account.
- Identify how creating an RFP creates leads in an organized format.
- Search for qualified venues via the Destination Guide, Promotions Hub, or Supplier Search.
- Locate suppliers that can accommodate the details included in your RFP.
- Send your RFP to selected venues.
- Recognize how sending your RFP in one format helps successfully track suppliers in a centralized location.

Watch the Video

## Planner Training II: Responses, Reporting, & Awarding RFPs

- Manage supplier responses by identifying the different available actions.
- Identify how to apply actions to suppliers in bulk.
- Run bid comparison reports.
- Recognize how data can be combined in a single, organized format.
- Determine if you should award or cancel your RFP business.
- Measure the outcome of your RFP business and track your communication with suppliers.

Watch the Video


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# Introduction

## Common Obstacles

This training has been developed based on common obstacles experienced by our customers. Before continuing with this video, think about the following questions and how they apply to planners' daily tasks.

## Have you ever experienced difficulty or obstacles with…

- Duplicating efforts every time you send a lead?
- Sharing leads and all of the corresponding data with colleagues?
- Maintaining personal relationships while streamlining your business?
- Sharing potential facility information with clients prior to bid reviews?
- Compiling data to create reports to establish credibility amongst decision makers and supplier partners?

## What will be covered in this training?

This is the last installment in the RFP Management training series. After gaining a basic knowledge of the RFP lifecycle in the first two videos, this video discusses strategies to maintain communication channels with your suppliers and utilize Cvent more efficiently. After completing this training you will be able to:

- Save time while creating RFPs by automating steps.

**APPLY IT:** Ensure efficiency and avoid wasting time repeating the same actions when creating your lead.

- Stay updated on the current status of the RFP and its associated suppliers through organization.

**APPLY IT:** Easily share lead information with colleagues and establish a system to track and manage RFPS.

- Maintain supplier and client relationships by utilizing communication tools.

**APPLY IT:** Share supplier information with clients and perform specific actions to maintain relationships with supplier contacts.


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- Monitor your business, trends, and history through tracking and reporting.

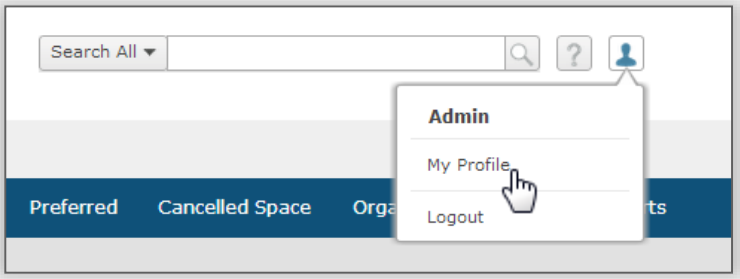
**APPLY IT:** Measure company success to establish strong credibility with decision makers and supplier partners.

## Saving Time through Automation

Pressed for time? We know how busy your schedules are and we've developed several ways for you to automate steps of the RFP process. We will discuss the top four areas in which you can configure features one time and automatically apply them for future RFPs.

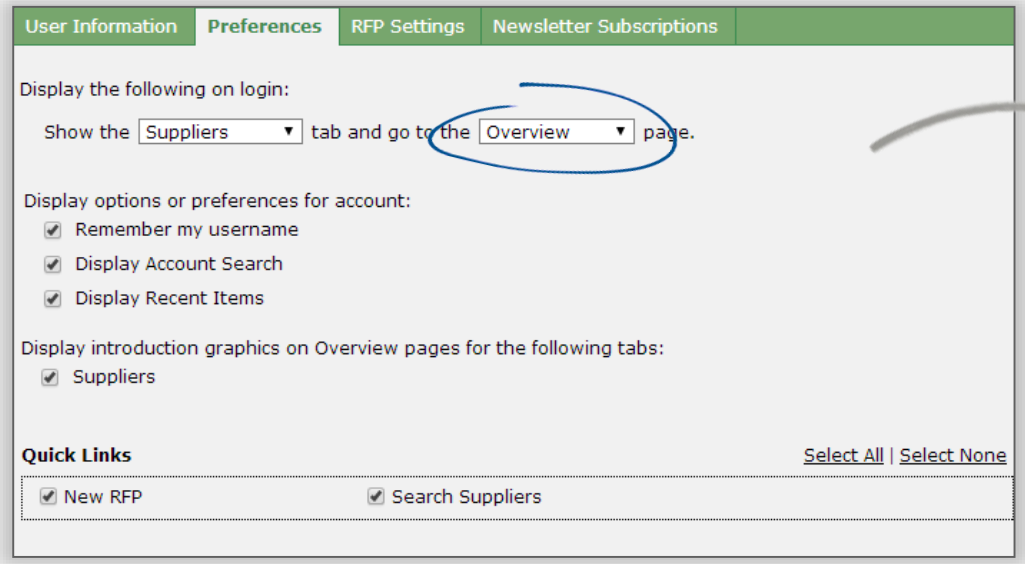
### My Profile

The **My Profile** section of Cvent contains your account information including your account number, username, and contact profile information. Additionally, this section controls your default account settings and shortcut links for the pages you use most frequently.



### Preferences

In the **Preferences** tab, adjust the screen to only show items that are relevant to your daily tasks. Choose to save account specific information upon logging in such as your username and recently viewed items.




***Adjust your login screen.*** *Choose the tab and desired page. When selecting the Suppliers tab, available pages include the Overview, Manage RFPs, Search, and Reports page.*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## RFP Settings

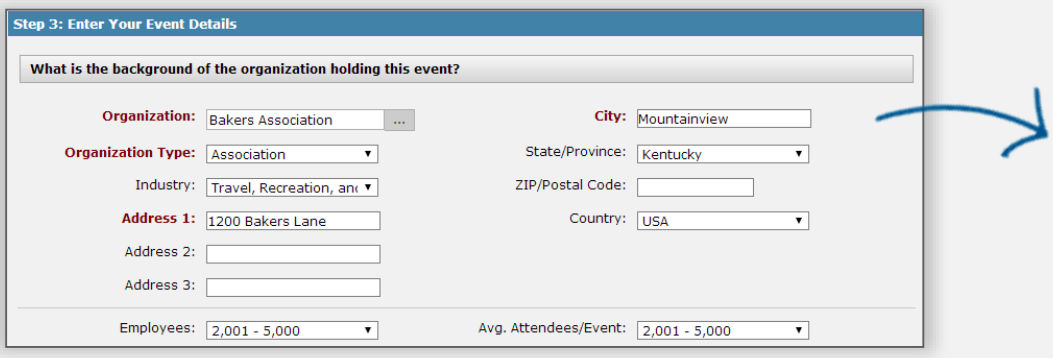
Click the neighboring tab, **RFP Settings,** to shorten the RFP creation and send process. Configure the following settings for all RFPs in your account:

- Unit of Measurement (Venue's specified system, English System, or Metric System)
- Receive automatic email notifications each time a supplier responds to an RFP
- Required proposal fields by default
- View recommended local destination experts when sending RFPs
- View Thank You page after sending an RFP
- View Alerts and/or Tips notifications when viewing an RFP

## Organization Profile

Utilize the **Organization Profile** to automatically pull important information about your organization or the host organization into each RFP. Simply complete the profile one time, and future RFPs will automatically fill with the organization's information. In addition to this saving you time, this also helps suppliers identify the best fit for this RFP by assigning the lead based on their market or territory.

To complete your profile, begin by clicking the **Suppliers** tab. Then, select **Organizational Profile** in the toolbar. Click **Add** and fill out as much information as you can for your organization. Select the profile that you will be using most frequently as the Default profile. At the bottom of this screen, choose if this information should be private and only available to you or if it should be public to all users in your account. Don't forget to **Save**. Repeat these steps for other organizations that you will be working with to submit RFPs.




Your organization's information is automatically filled in Step 3 of the RFP Wizard.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**TRY IT:** Complete your Organizational Profile.

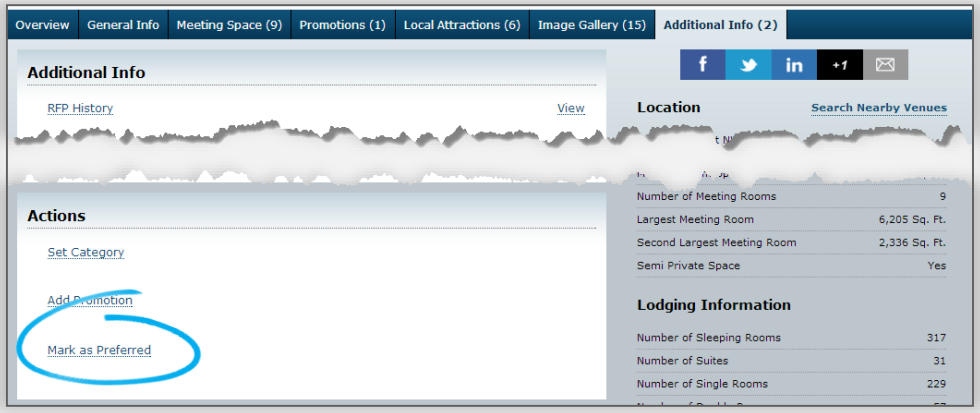
## Preferred

When your organization has existing relationships with various suppliers, use the **Preferred** functionality to easily distinguish these suppliers in your account and during the supplier search. All of this information can be viewed by selecting **Preferred** in the toolbar and selecting the appropriate section link on the left.

Enterprise Feature

## Preferred Venues and Services

Indicate if a particular venue or service should be considered first when sending out an RFP. To mark a venue or service as preferred, begin by searching for the particular venue or service. Within the venue or service profile, click the **Additional Info** tab in the middle of the screen. Then, under the **Actions** section, select ***Mark as Preferred***. Enter any additional notes about this provider and click **Submit.**




*Review all Preferred Venues and Services in **Preferred > Preferred Venues** & **Preferred > Preferred Services** respectively.*

## Preferred Brands

Do you have a standing relationship with a hotel brand? Indicate your preferred brands to use in your account. Begin by clicking **Preferred** in the toolbar. Then, select **Preferred Brands** on the left, under section links. Click **Add** and select the Hotel Chain. Select the associated brands within the hotel chain and click **Add.**

## Supplier Categories

Simplify your supplier search by organizing hotel brands by specific criteria such as pet friendly, close to airports, endorsed by your client's organization, or any other criteria. Once venues are associated to categories, the category label will display in the search results.

To create a supplier category, begin by clicking **Preferred** in the toolbar. Select **Supplier Categories** on the left, under section links. Click **Add** and name your category. Assign the category a color using the color picker icon . Click **Add Brand** and select the Hotel Chains. Click **Next** and choose any of the brands associated to the chains. Click **Add** and click **Save.**

12. Ice Cap Inn
The Ice Cap Inn is the lap of luxury in the South Pole Metropolitan Area. Indulge in everything from our frozen cocktails on the iceberg to our taboggan and bobsled competitions.
AF&M Client Preferred
Pet friendly
Waterside



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# Negotiated Rates & Promotions

### Negotiated Rates

Easily indicate established discounts with any hotel chains, brands, or venues with your organization. After adding any negotiated rates, quickly identify these properties by the icon or via the filters in the search results.

Proposed rates from suppliers will automatically be added to the Negotiated Rates section of your account. In addition to these rates, choose to also import your own rates. To add a negotiated rate, click **Preferred** in the toolbar and select **Negotiated Rates** on the left, under section links. Click **Add.** Enter the rate details, upload any attachments, and include the associated brands. Don't forget to **Save**.

*Review all Negotiated Rates under **Preferred > Negotiated Rates.***

### Promotions

Similarly to negotiated rates, add any specific promotions for short-term or long-term timelines to be considered when sending RFPs. To set these up, begin by clicking **Preferred** in the toolbar and select **Promotions** on the left, under section links. Click **Add** and enter the promotion's details, and include the associated brands. Click **Save**.

## Rate History

Strategize your next rate negotiation by consulting your previous rates in one central location. All imported rates are displayed within each venue's profile for easy access. Choose to compare multiple rates in the **Rate History Details report.** To upload your previous rate history, click **Preferred** in the toolbar and select **Rate History Import** on the left, under section links. **Download** the sample import file and add your customized information to it. After saving the file as tab delimited (.txt), **Choose the File**, and select **Import File.**

*Access the Rate History Details report in **Suppliers > Reports > Administration (Report Category).***

## NSO Contacts

Recall from the first part of this training series, you learned how to copy an NSO on an RFP. In this section, learn how to create a new NSO contact in your account. The NSO Contacts section serves as your account rolodex for all of your chain, brand, and venue contacts. It even stores your CVB contacts!

**NOTE:** Your user rights determine if you're able to add NSO contacts. If you don't have access, you are able to default existing contacts for your username.


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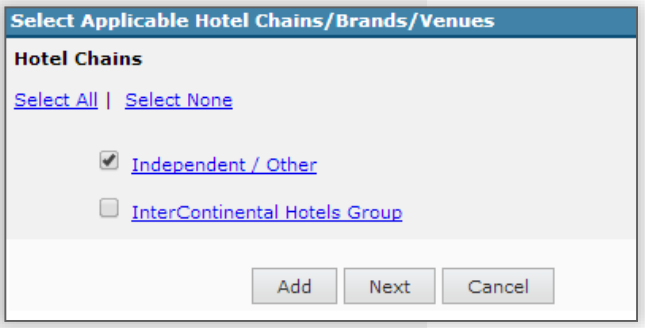
## Adding an NSO Contact

To add a new NSO contact to your account, begin by clicking **Preferred** in the toolbar. Select **NSO Contacts** on the left, under section links. Click **Add.** In **Step 1,** enter the contact's first name, last name, and email address. Choose if this contact should be ***private*** and only accessible by you or if it should be ***public*** and accessible by all users in your account. Click **Next.** In **Step 2,** associate the hotel chains, brands, or venues to this contact. Click **Add** and select the Hotel Chains. Click **Add** or click **Next** to narrow down the associated brands. Click **Finish.**

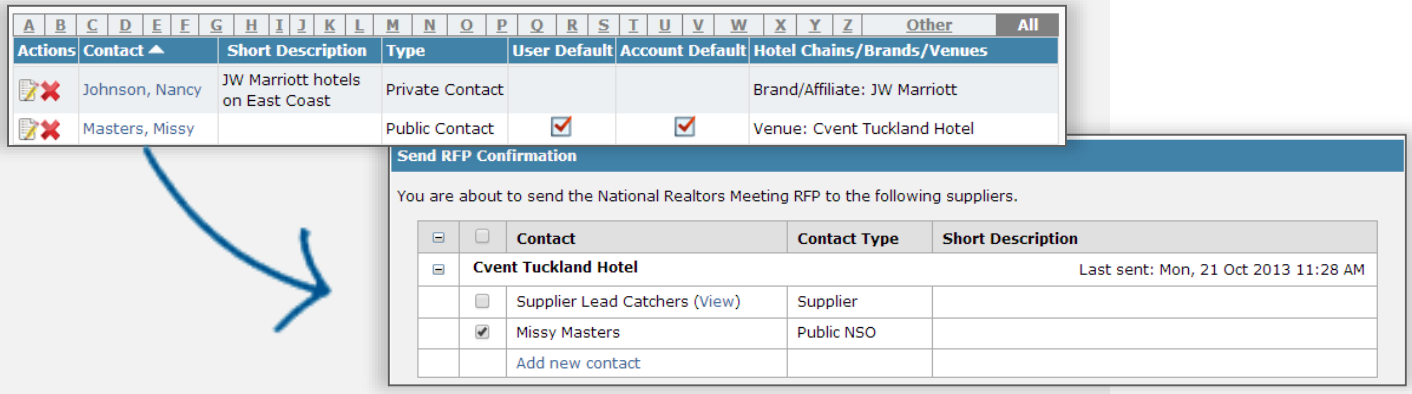
**TIP:** To associate an NSO Contact to a CVB or membership organization, use the "Independent/Other" Brand.




## Defaulting your Contacts

When you are unable to create new NSO contacts due to your user rights, choose to default the contacts to be automatically associated to the RFPs you send. From the **NSO Contacts** screen, select **Set Default** from the **Actions** dropdown. Check off the NSO contacts to be included on the RFPs you send and click **Save.**

Default contacts can also be set for your entire account. From the **Actions** dropdown, select **Set Account Default.** Check off the contacts to be associated to all RFPs sent from your account and click **Save.**




After adding any NSO contacts, choose to search for these contacts using search criteria such as their last name, hotel chain, brand, user group, or supplier type.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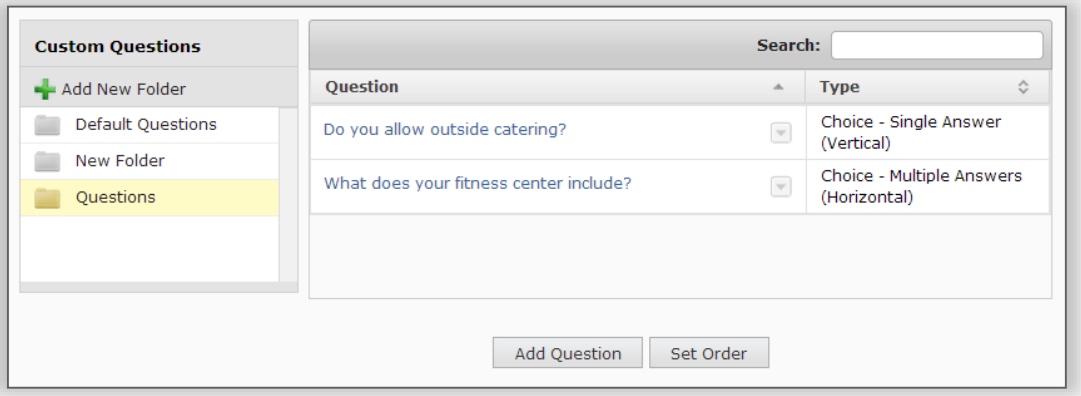
## Custom Questions

Tired of having to follow up with the same questions to Suppliers after they've submitted a bid? Save time by including these questions in your RFPs. These questions are stored in your Administration tab and can be applied to multiple RFPs.

Begin by clicking the **Administration** tab. Click **Libraries** in the toolbar. Then, select **Questions** on the left, under section links. Organize questions into folders using the Add New Folder on the left. To add a new question, click on the folder to associate the question, then click **Add Question.**




This brings you into a three step wizard. In **Step 1**, select the question type. Click **Next.**

| Question Type | Definition | Formatting Options |
|---|---|---|
| **Choice – Multiple Answers** | Allows suppliers to select more than one of the provided answers. | ▸ Horizontal<br>▸ Vertical<br>▸ Dropdown |
| **Choice – Single Answer** | Allows suppliers to only select one of the provided answers. | ▸ Horizontal<br>▸ Vertical<br>▸ Dropdown |
| **Open Ended Text** | Allows suppliers to provide their own answer. | ▸ Comment Box<br>▸ Date/Time<br>▸ One Line |

**TIP:** For more streamlined reporting, choose **Multiple or Single Choice** question types.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In **Step 2**, build out the question. Enter the Question Text, Answer Choices, and determine if the question is required. Click **Next.** In the final step, preview the question and click **Save.**

### Default Custom Questions

Default Custom Questions can be automatically associated to each RFP that is sent from your account. To access these questions, click the **Administration** tab. Then, select **Account Settings** in the toolbar. Select **RFP Settings** on the left, under section links. Then, choose the **Default Questions** tab in the middle of the screen. Click **Add Questions** and follow the same steps mentioned above.

In addition to account-wide Default Custom Questions, choose to create your own personal questions to add to your RFPs. To configure these questions, click the **Suppliers** tab. Then, select **Preferred** in the toolbar. Select **Custom Questions** on the left, under section links. Within the question folders, choose the **Default Questions** folder and click **Add Question**. This brings you into the question wizard in which you will follow the same steps mentioned above.


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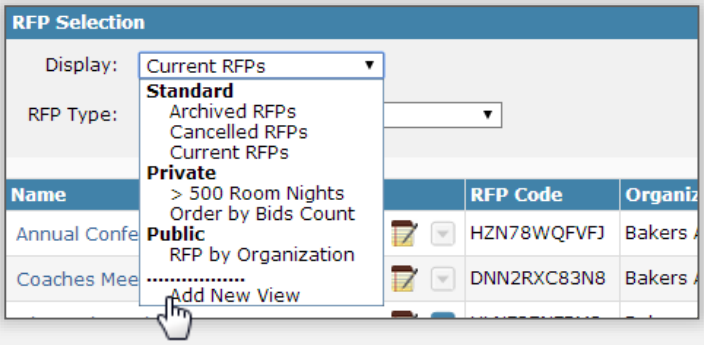
# Tracking the RFP Lifecycle

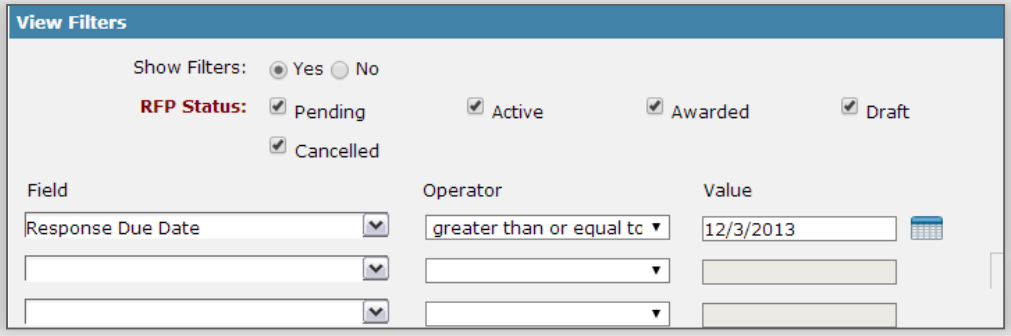
Staying organized is the key to success and Cvent provides you with the tools to easily view your RFPs and associated suppliers.

## Custom RFP Display Views

Track your RFPs using your own criteria to strategically organize them in your account. Create an *unlimited number of views* to sort your RFPs by filters such as dates or colleagues. To create a custom RFP display view, begin by clicking **Manage RFPs** in the toolbar. Select **Add New View.**




Enter the Name for the new view. This will appear in the Display dropdown menu. Choose up to six columns to display in this view and configure the filters. Choose the applicable RFP status to display and add the filters based on any standard RFP fields, custom RFP fields, or Proposal fields. Click **Save.**




**TRY IT:** Create your own Custom RFP Display View.

KEY TERM

*Easily view RFPs that fall into a specified date range.*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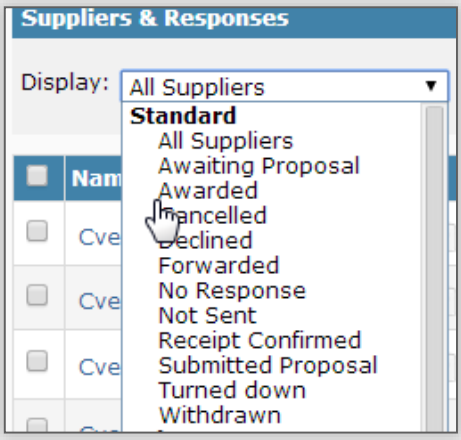
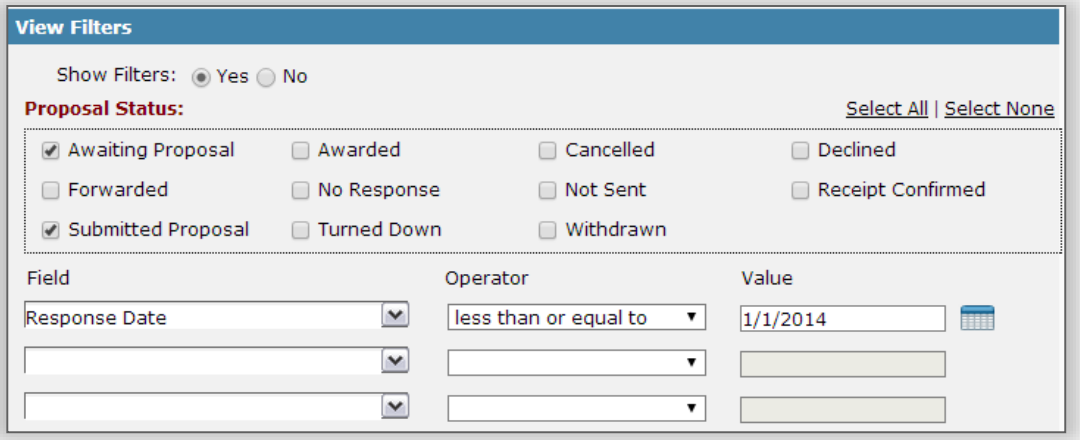
## Suppliers & Responses Views

In addition to organizing your RFPs, choose to also customize how you view the suppliers associated to each RFP. Select one of the standard views that segments the suppliers by the response status or create your own.

Standard views include: Awaiting Proposal, Awarded, Cancelled, Declined, Forwarded, No Response, Not Sent, Receipt Confirmed, Submitted Proposal, Turned Down, and Withdrawn.




To create a new Supplier View, begin by clicking **Manage RFPs** in the top navigation bar. Click on the name of an RFP. Then, select **Suppliers & Responses** on the left, under section links. From the Display dropdown, select **Add New View.** Enter in a Name for the view and choose the columns to display. Then, select the proposal statuses to include in this view and apply any additional filters.




KEY TERM

*Easily view Responses that are in Awaiting Proposal or Submitted Proposal that have been responded to within a given date range.*

**TRY IT:** Create your own Custom Suppliers & Responses View.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# Maintaining Relationships

Another key to any successful business relationship is consistent communication. Cvent provides you with the tools to easily maintain communication with all of your suppliers.

## Communicating to the Decision Maker(s)

Before working with venues, provide your decision maker with valuable information about the potential venues.

## Comparing Suppliers

Is your supervisor asking you the same question about multiple venues? Be the hero at your next meeting by easily having this information available for all potential suppliers in an easy to read format using the *Compare Suppliers Report*.

To view this report, click **Manage RFPs** in the toolbar. Then, select the name of the RFP. Click **Suppliers & Responses** on the left, under section links and check off the suppliers to compare. From the **Reports** dropdown, select **Compare Suppliers Report**. This information automatically exports into an Excel file in which you can view all venues side by side.

| **Supplier Information** | | | |
|---|---|---|---|
| Name: | Cvent Capital Inn | Cvent Compass Inn | Cvent Interstate Hotel |
| AAA Rating: | 4 Diamonds | 4 Diamonds | 3 Diamonds |
| Forbes Rating: | 4 Stars | 4 Stars | - |
| **Meeting Space** | | | |
| Meeting Room Space: | 12,000 Sq. Ft. | > 100,000 Sq. Ft. | 17,000 Sq. Ft. |
| Number of Meeting Rooms: | 16 | 13 | 10 |
| Largest Meeting Room: | 12,000 Sq. Ft. | 20,000 Sq. Ft. | 3,000 Sq. Ft. |
| **Lodging Information** | | | |
| Number of Sleeping Rooms: | 444 | 250 | 521 |
| Number of Suites: | 32 | 20 | - |
| Number of Single Rooms: | - | 175 | 200 |
| Number of Double Rooms: | 181 | 55 | - |



**TIP:** This report can also be run directly from the **Supplier Search**. This is helpful to compare summary information for multiple venues found in their venue profiles.


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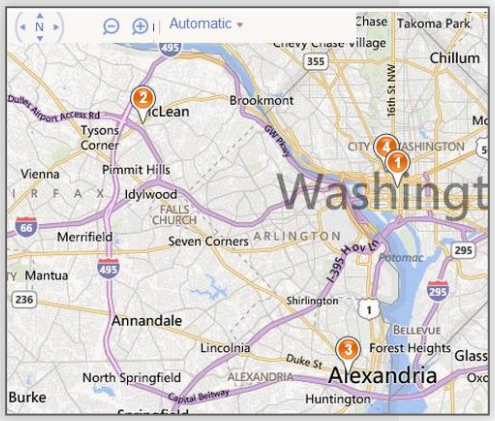
## Mapping Suppliers

In addition to providing the comparison data for multiple venues, your supervisor may also inquire about the relative location for each venue. Rather than conducting individual map searches with your preferred search engine, pull this information directly in Cvent!

Within the **Suppliers & Responses** section of your RFP, check off the suppliers to view. Then, from the **Actions** dropdown, select **Map Suppliers** and view the venue's relative locations to one another using our Bing maps integration.




## Communicating to Suppliers

In addition to communicating with your decision makers, you may need to reach out to your potential suppliers during the bid process. Communicate with any potential suppliers directly from the **Suppliers & Responses** page.

## Send to NSO Only

Instead of sending the RFP to the lead catcher of a venue, choose to send it directly to your NSO contact. To do this, select **Send to NSO Only** from the **Actions** dropdown. Then, check off the NSO contacts that you wish to send the RFP and enter in an additional message. Click **Send** and the selected NSO contacts receive an email notification in which they can forward onto other suppliers.

cvent SupplierNetwork
Find Suppliers, Get Quotes, Compare Bids
Chat with a Cvent Representative
Hi,
This online request for proposal was sent directly to you from Carlotta Crenshaw through the Cvent Supplier Network.
This RFP was sent through Cvent to specific industry contacts only and was not directly sent to any venues or suppliers through Cvent.
View the details of the request and action options below.
Forward the RFP
Actions
Forward the RFP
View this RFP
Change the NSO
Need Help?
Click here to get more information, read frequently asked questions, and learn more about who we are and what we do.
Get more information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## Send Message

Reach out to a single supplier or multiple suppliers from the **Suppliers & Responses** page within an RFP. Check off the suppliers and select **Send Message** from the **Actions** dropdown. Select the specific contacts associated to each Venue and create your message. After writing your message, click **Send.**

*View your messages under **Manage RFPs > RFP Selection > Message History.***



**TIP:** If you're planning on using this message again, select **Save this message for later use.**

## Remove, Cancel, or Decline Bids

While you're debating between your final venue candidates, gently dismiss the others by cleaning up your list of suppliers. From the **Suppliers & Responses** section link within an RFP, choose to **Remove, Cancel, or Decline** bids from suppliers from the **Actions** dropdown.

| Action | When to Use |
|---|---|
| **Remove Suppliers** | Use for suppliers that are still in the ***Not Sent*** status. Upon clicking **Remove Suppliers**, this supplier will no longer appear on the Suppliers & Responses page. |
| **Cancel Suppliers** | Use for suppliers that are ***Awaiting Proposal, Forwarded, or Receipt Confirmed*** statuses. Upon selecting **Cancel Suppliers**, you will need to provide a **cancellation reason** to the supplier. |
| **Decline Suppliers** | Use for suppliers that have ***submitted a proposal***, but you are not going to move forward with their bid. Upon clicking **Decline Suppliers**, provide a **decline reason** along with any additional comments about why you are not awarding this business. |


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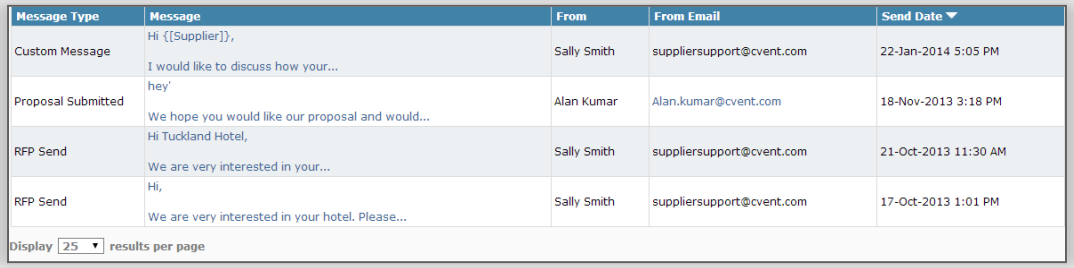
# Monitoring Your Business

Once you've sent out your RFP, it's important for you to review the communication between your suppliers and RFP trends. Cvent automatically tracks this information for you to easily view RFP history and compiles reports with data important to your organization.

## Message History

View the previous messages that have been sent from a specific RFP. Look at the type of message, the message content, sender information, and send date. To access this information, click **Manage RFPs** in the toolbar. Then, select the name of the RFP and click **Message History** on the left, under section links.



| Message Type | Message | From | From Email | Send Date |
|---|---|---|---|---|
| Custom Message | Hi {[Supplier]},<br>I would like to discuss how your... | Sally Smith | suppliersupport@cvent.com | 22-Jan-2014 5:05 PM |
| Proposal Submitted | hey'<br>We hope you would like our proposal and would... | Alan Kumar | Alan.kumar@cvent.com | 18-Nov-2013 3:18 PM |
| RFP Send | Hi Tuckland Hotel,<br>We are very interested in your... | Sally Smith | suppliersupport@cvent.com | 21-Oct-2013 11:30 AM |
| RFP Send | Hi,<br>We are very interested in your hotel. Please... | Sally Smith | suppliersupport@cvent.com | 17-Oct-2013 1:01 PM |

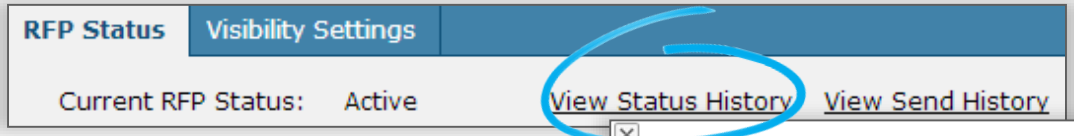
Display 25 results per page

## RFP Administration

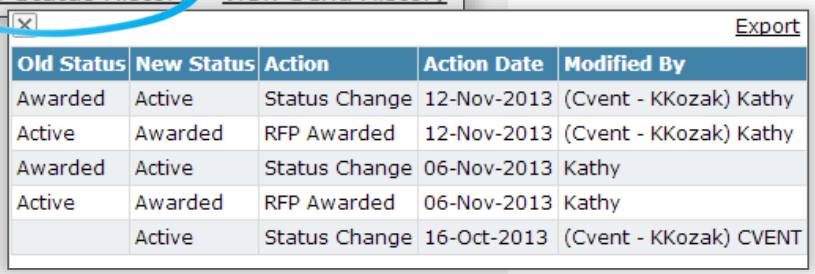
In this section, view basic logistical information about your RFP. The first tab, **RFP status** contains your RFP status and RFP Milestones such as your RFP Name, RFP Type, RFP Code, Decision Date, and Response Due Date. From this tab, it's also possible to view historical information about your RFP.

## Viewing History

Within the **RFP Status** tab, view your *RFP's Status History or Send History*.




The **Status History** tracks the dates each time an RFP changes to a different status. This is helpful when tracking the RFP lifecycle and also view who modified each status.



Export

| Old Status | New Status | Action | Action Date | Modified By |
|---|---|---|---|---|
| Awarded | Active | Status Change | 12-Nov-2013 | (Cvent - KKozak) Kathy |
| Active | Awarded | RFP Awarded | 12-Nov-2013 | (Cvent - KKozak) Kathy |
| Awarded | Active | Status Change | 06-Nov-2013 | Kathy |
| Active | Awarded | RFP Awarded | 06-Nov-2013 | Kathy |
| | Active | Status Change | 16-Oct-2013 | (Cvent - KKozak) CVENT |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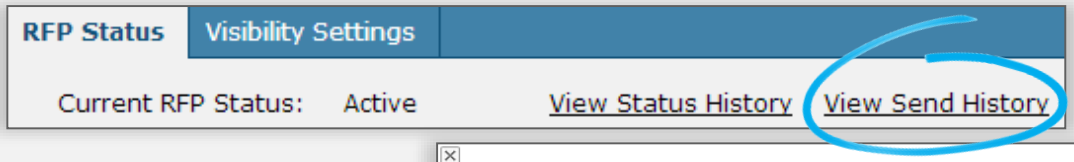
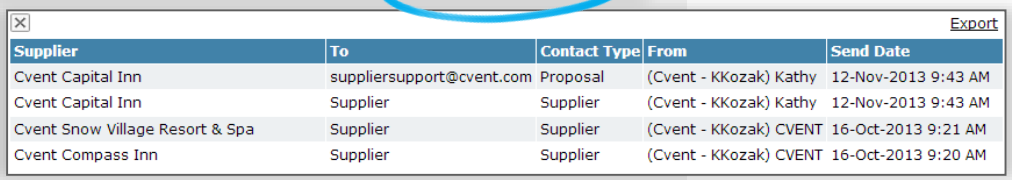



The **Send History** tracks each time a message was sent to a supplier associated to this RFP.




| Supplier | To | Contact Type | From | Send Date |
|---|---|---|---|---|
| Cvent Capital Inn | suppliersupport@cvent.com | Proposal | (Cvent - KKozak) Kathy | 12-Nov-2013 9:43 AM |
| Cvent Capital Inn | Supplier | Supplier | (Cvent - KKozak) Kathy | 12-Nov-2013 9:43 AM |
| Cvent Snow Village Resort & Spa | Supplier | Supplier | (Cvent - KKozak) CVENT | 16-Oct-2013 9:21 AM |
| Cvent Compass Inn | Supplier | Supplier | (Cvent - KKozak) CVENT | 16-Oct-2013 9:20 AM |

Use the Contact Type column to view who sent the RFP. Contact Types include Suppliers, Proposals, and Public or Private NSO.

## Sharing Visibility

Customize the users in your account that should have access to view this RFP. To adjust these settings, select neighboring tab, **Visibility Settings.** Click **Edit** and segment visibility by user groups or by individual users. Click **Save** when finished.

**NOTE:** Account Administrators will have access to **all RFPs** in your account.

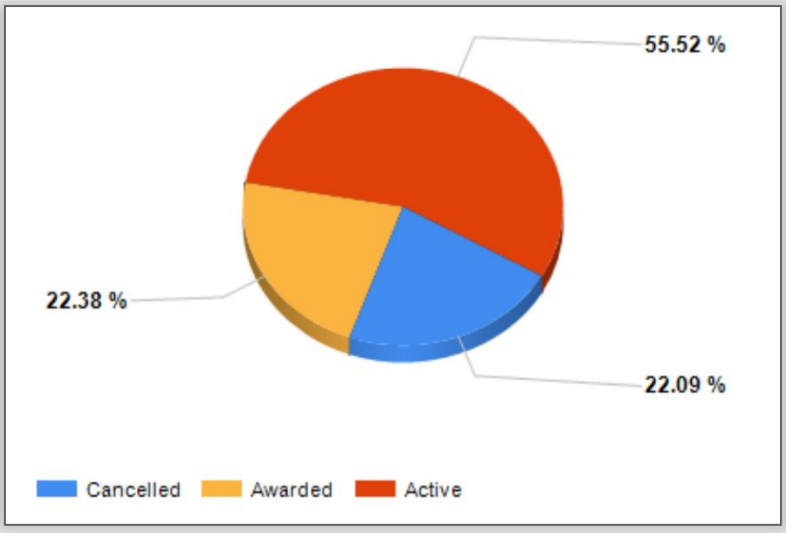
## Cross RFP Reports

Easily view trends across all of the RFPs in your account by accessing the Reports section in your account. In each report configuration, choose the RFPs to include based on the RFP dates and apply any advanced filters.

All Cross RFP reports can be found by selecting **Reports** in the toolbar.

## RFP Status

Quickly view the RFPs you've sent, awarded, cancelled, contracted, or received bids for, including all key dates and a pie chart broken down by RFP status. This report also lists peak rooms, total rooms, and budgeted room rates for each RFP.





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### Awarded RFPs

Easily check how many RFPs you awarded, and to whom, during a specified timeframe. This report includes key dates, supplier locations, total room nights, total attendees, and pricing and spend.

### RFP Volume by Vendor

Find out how much of your business is going where. For each supplier chain, this report shows the number of RFPs sent, awarded, bid on, and contracted, as well as their total estimated value, average room nights, and average attendees.

## Glossary of Key Terms and Definitions

| Term | Definition |
|---|---|
| **Cross RFP Report** | Reports reflect account wide data for all RFPs. These are ideal to compare and contrast RFP trend information. |
| **Custom Display Views** | Configure a customized set of RFPs or Suppliers to display based on a set of criteria. Choose to create a custom RFP display view *via the Manage RFPs page or a custom Suppliers & Responses view within the Suppliers & Response section link within each RFP.* |
| **Custom Questions** | Additional questions that are created to ask suppliers unique information during the RFP process. |
| **Default Custom Questions** | Custom questions that are automatically associated to each new RFP created in your account. |
| **Organizational Profile** | Detailed information about an organization including the organization name, type, industry, key contact information, and typically event attendee numbers. Completed information from the Organizational Profile is automatically pulled into the Organization Information during the RFP Creation Wizard. |


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